



Starwood Business Group  
Business Sales • Valuations • Exit Planning

## **BUSINESS PROFILE WORKSHEET**

Business Name: \_\_\_\_\_

This information will produce a *Business Profile* to give to potential buyers and for other agents. “Sell” the business, provide explanations, and paint a picture of the business and its potential.

### **PRODUCT/SERVICE**

Description of Product or Service:

Price Range of Product or Service, Margins, etc.:

Details if a Franchise:

### **CUSTOMER BASE**

Description of Customer Base:

### **MARKETING**

Description of Marketing Efforts:

### **STRENGTHS AND OPPORTUNITIES**

Strengths or Unique Characteristics:

Opportunities for improvement:



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**HOURS AND STAFFING**

Description of Number, Type and Functions of Employees; Profit Sharing, Benefits:

Description of Management Structure and Key Employees; Salary, Profit Sharing, Benefits:

**AREAS, FACILITIES AND EQUIPMENT**

Description of Geographic Area:

Description of Facilities:

Description of Equipment:

Description of Lease:

**BACKGROUND**

Description of Years Established, Growth History (if significant), etc.:

**FINANCIAL SUMMARY**

Description of Assets:



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Revenue, COGS, Margin, Expenses, Cash flow

**REASON FOR SALE**

Reason for Sale to go on Business Profile Given to Prospective Purchasers:

**ADDITIONAL COMMENTS**

Comments to go on Business Profile (given to Prospective Purchasers):

Comments to go on Internal Copy of Profile (for other agents to read):