

Information Request Checklist:



- 3 years of tax returns
 - If corporation, entire Federal return plus all supporting schedules/statements
 - If Proprietorship, include Schedule C plus supporting schedules/statements
- The most recent interim profit and loss statement and balance sheet (same date)
- Sales tax returns for the interim year. Sales tax returns for 3 years
- Complete list of all equipment, fixtures, furniture and other assets to be included or excluded in the sale.
- Estimate the current market value of all equipment (if \$5,000 or more)
- Provide the approximate value of inventory, at cost, to be included in purchase. If inventory count was prepared by an outside company, include the valuation report.
- Name, email, and phone number of accountant
- Copy of all building leases
- Copy of all capital (equipment) leases
- Copies of any loan documents, contracts or agreements for any business debt/liability
- Copy of any environmental reports and real estate appraisals
- Copy of any agreement or manuals regarding employee benefits
- Copies of all patents, copyrights or other intellectual property or trademarks
- Copies of all other documents needed to present a fair and accurate description of the business to prospective buyers
- Copy of Franchise Disclosure Document and Franchise Agreement, if applicable
- Corporate or Partnership Resolution to sell business
- Identify any specific business shortcomings or opportunities
- Completed Business Information Summary (form)
- List of any contracts for Services
- Copies of any brochures, ads, articles, etc.
- Identify any assets to be included in sale that aren't shown on the balance sheet
- Organizational Chart (job description and rates of compensation)
- Any employment contracts, representative agreements, etc.
- _____
- _____
- _____

Seller: _____

Date: _____