

Business Buyer Buyer Profile / Information / Personal Financial Statement

Buyer Profile / Information - Part 1

Name: _____ Spouses Name: _____
Mailing Address: _____ City: _____ State: _____ Zip: _____
Home Address: _____ City: _____ State: _____ Zip: _____
Own: _____ Rent: _____

US Citizen: Yes ___ No _____ Spouse: Yes ___ No _____

Home Phone: _____ Work Phone: _____ Email: _____
Cell Phone: _____ (Preferred contact Home ___ Office ___ Cell __, times: AM, DAY, Evening)

Current Business or Employer: _____

Address: _____

Previous Business Experience: _____ How Long? _____

Type of Work: _____ Annual Income: _____

Your Education: _____

Other special education or training: _____

Significant work experiences: _____

What ad (or other source) brought you to our office: _____

What is your motivation for buying a business? _____

How long have you been looking for a business? _____

Type of Businesses preferred: _____

Type of businesses in which you are not interested: _____

Who will assist you in operating the business?

Location Preferences: _____ Income Required: _____

Who besides you will be making the decision?

Buyer Profile / Information - Part 2

What type of business have you considered?

1. _____ 2. _____ 3. _____ 4. _____

What did you not like about these businesses? _____

What did you like about these businesses? _____

In order of preference what type of business are you looking for?

- 1.
- 2.
- 3.

What are the three most important things for a business that you would consider?

- 1.
- 2.
- 3.

How do you plan to finance this purchase? _____

Who will assist you with the financing? _____

Would you work in the business?: FULL TIME: _____ PART TIME: _____

How much do you have available to invest in this venture now? _____

In what form are these funds (CD's, savings accounts, stocks, real property, loans, etc.)?

Do you have additional source of investment capital? _____

If yes, please explain:

Annual income desired from the new business: _____

Any additional information that you think may help us locate a desirable business opportunity for you?

Are you in a position to make an offer now? _____ If not, explain _____

Credit References: Bank _____
Accountant _____
Other _____

Buyer Profile / Information / Personal Financial Statement - Part 3

ASSETS

Cash in checking account \$ _____

Cash in savings accounts \$ _____

Stocks and bonds \$ _____

IRA's, retirement plans, 401K's \$ _____

Cash surrender of life insurance \$ _____

Real estate, home \$ _____

Real estate, other \$ _____

Automobile(s) \$ _____

Your own business \$ _____

Appraised collectibles \$ _____

Other Assets (Itemize) \$ _____

TOTAL \$ _____

LIABILITIES

Notes payable to banks \$ _____

Notes payable to finance companies \$ _____

Real estate indebtedness \$ _____

Automobile(s) indebtedness \$ _____

Owing on life insurance \$ _____

Charge accounts \$ _____

Credit Cards \$ _____

Taxes payable \$ _____

Other liabilities(describe): \$ _____

TOTAL \$ _____

NET WORTH (total assets minus total liabilities): \$ _____

Amount to finance \$.

TOTAL INVESTMENT \$.

Do you have a financial partner or any other personal source of investment capital? Yes ____ No ____
If yes, please explain: _____

Do you have additional income sources? Yes ____ No ____ If yes, please
explain: _____

Income Expectations: After 1 year (i.e., second year) \$ _____