Business Team
BUSINESS SALES & ACQUISITIONS

INFORMATION REQUIRED TO PACKAGE YOUR BUSINESS FOR SALE

Business Name _____ Seller's Name _____

I. FINANCIAL

- ☐ Previous 3 yrs Profit & Loss statements and current Year-to-Date Profit & Loss statement, **signed by owner**
- ☐ Previous 3 years Federal Income Tax Returns, 1120, 1065, Schedule C or Partnership/LLC, **signed by owner**
- ☐ Notes to be assumed by buyer, **if applicable**

II. EQUIPMENT

- ☐ List of furniture, fixtures and equipment **to be included in the sale of the business** (Form attached), **signed by owner**
- ☐ Equipment leases to be assumed by buyer, **if applicable**

III. LEASE

- ☐ Current lease plus options and any amendments
- ☐ Landlord's name and phone number: _____

IV. OTHER

- ☐ Corporate Documents: Articles of Incorporation; Minutes showing list of Officers
- ☐ Franchise agreement, application, and questionnaire, **if applicable**
- ☐ Business license and/or any other licenses required to operate the business
- ☐ ABC license, **if applicable**
- ☐ Business Property Tax Statement – Form 571L, **if applicable**
- ☐ Employment Development Department Number (EDD)
- ☐ State Board of Equalization (Seller's Permit Number)
- ☐ List of Employees (Form attached)
- ☐ Accountant's name and phone number:_____
- ☐ A Brief Description, including product line, area the company services, typical customer(s), areas that can be expanded and/or any other information that may help us better describe your company. (Form Attached)
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____