

Attention:

CONFIDENTIAL CUSTOMER PROFILE

Last Name: _____ **First Name:** _____

Address: _____

City: _____ **State:** _____ **ZIP:** _____

Phone: _____ **Fax:** _____ **E-Mail** _____

PLEASE SELECT ONE CHOICE FOR EACH STATEMENT

1. My cash flow needs in the first year of business ownership will be:

_____ Less than \$25,000 _____ \$25,000 to \$50,000 _____ \$50,000 to \$75,000
_____ \$75,000 to \$100,000 _____ \$100,000 to \$200,000 _____ Over \$200,000

2. I can invest as a down payment (and still have working capital):

_____ Less than \$25,000 _____ \$25,000 to \$50,000 _____ \$50,000 to \$100,000
_____ \$100,000 to \$150,000 _____ \$150,000 to \$300,000 _____ Over \$300,000

3. I want the business I buy to have this characteristic:

_____ Absentee ownership _____ Work from home _____ Suitable for a couple
_____ Excellent records _____ See remarks below _____ Owner/operator

4. I am primarily looking for a business:

_____ To explore possibilities _____ To support my needs _____ To add to my present biz
_____ As an investment _____ To replace current job _____ For family member

5. I am very interested in businesses in this category:

_____ Automotive	_____ Biz to biz services	_____ Food services
_____ Manufacturing	_____ Retail	_____ Information Technology
_____ Convenience store	_____ Art/Jewelry	_____ Lodging
_____ Business & Finance	_____ Communications	_____ Personal Services
_____ Real Estate	_____ Construction Trades	_____ Other _____

I am especially interested in a _____ business.

(examples: gas station, coffee shops, gourmet food, landscaping contractor, widget manufacturing, tanning salon)

6. I would like to find a business in the following time frame:

_____ Immediate _____ 3 – 6 months _____ 6 – 9 months
_____ 9 – 12 months _____ more than 1 year
_____ Other _____

7. I would like a business that uses this skill that I have:

_____ General management _____ Operations _____ Mechanical
_____ Computers _____ Sales & Marketing
_____ Other _____

8. I have been actively searching for a business to buy for:

_____ Less than 3 months _____ 3 to 6 months _____ More than 6 months

9. I am searching for a business to be purchased by:

_____ Me individually _____ Spouse & I _____ Business partners & I
_____ My current business _____ My employer _____ An investment group

10. I can tell you the following about my work experience and back ground to help you select the best business choices for my review:

Things A Buyer Should Know:

- CONFIDENTIALITY is of the utmost importance! Do not discuss sale with Seller’s employees.
- Look for a business that you are familiar with and will enjoy managing.
- Some components of a successful business: Location, Track Record, and Management.
- Most Sellers sell for a "human" reason such as: retirement, poor health, divorce, e
- Small business financials are usually done to pay less tax, not to show large profits.
- NEGOTIATE! If you like the business but can’t justify the price, make an offer that suits you.
- Fully understand “Discretionary Earnings” as used to determine value.

I am of legal age and financially capable as represented above:

Customer’s Signature

Date

Agent’s Signature

Date