

Certified Acquisition Advisors LLC

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CONFIDENTIAL BUYER PROFILE and INFORMATION REQUEST

Name: _____

Spouse's name: _____

Children's names and ages: _____

Address: _____

Phone(s): _____

Email: _____

Please Answer The Following:

Financial

- 1) How much do you want your total investment to be?
- 2) Amount of cash available for down payment?
- 3) Other sources of funds identified and available.
- 4) Minimum yearly income requirement?
- 5) Minimum monthly income requirement?

- 6) Is immediate income required?
- 7) What is your approximate net worth?
- 8) How much of your net worth is liquid?
- 9) How is your credit?
- 10) Provide a financial statement and supporting documents.

Note: A financial statement will be required before receiving financial information on any target company.

Business Preferences

- 1) Describe the type of business sought.
- 2) Describe and list acceptable alternatives.
- 3) Will you consider a franchised business?
- 4) Will you consider a retail business?
- 5) Will you consider a service business?
- 6) Will you consider a food or beverage related business?
- 7) What types of businesses will not be acceptable?
- 8) Who else is involved in making the decision?

Location and Timing

- 1) What are your first three preferences for location?

- 2) Would you relocate for the right opportunity?
- 3) What geographic areas are unacceptable?
- 4) How soon can you act on an opportunity?
- 5) If you found the right business, how soon can you make an offer?
- 6) When would you like to take possession?

Background

- 1) Provide details of any previous business ownership.
- 2) Describe details of previous employment.
- 3) List personal skills (financial, mechanical, engineering, sales, administrative, etc.)
- 4) Describe educational background.
- 5) Provide a current resume.
- 6) List business objectives and reasons for wanting to own a business.
- 7) Will spouse or other family members be involved in daily business operations?
- 8) How long have you been searching for a business?
- 9) What businesses were previously considered?
- 10) If a business that was considered was not acquired, why not?
- 11) What businesses were previously rejected without a detailed review?

Skills

Rate your skills from 1 to 10, with 10 being highest, in the following areas:

- Management _____
- Mechanical _____
- Sales _____
- Financial _____
- Administrative _____
- People _____

Other

Have you ever worked with a professional business broker before?

Do you have any physical conditions that might affect the type of business you buy?

When reviewing advertisements for businesses, List any words that cause excitement or curiosity:

Please list any other important factors or concerns not mentioned above.
