

# Business 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 \_\_\_\_\_

### Authorization to verify information

I authorize Broker, and the Sellers of any business on which I make an offer, to verify any of the above information and to obtain a credit report.

Buyer's Signature: \_\_\_\_\_ Date \_\_\_\_\_

Buyer's Signature: \_\_\_\_\_ Date \_\_\_\_\_

## 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) \$ \_\_\_\_\_