

CONFIDENTIAL INFORMATION FOR USE BY BUSINESS TEAM ONLY

Name: _____ Business Name: _____

Home Address: _____ City: _____ State: _____ Zip: _____

Business Phone: _____ Home Phone: _____ Fax: _____

BACKGROUND INFORMATION

Education: _____
College(s)

Degree(s): _____

Business Experience: _____ Sales _____ Manufacturing _____ Accounting
(Check All That Apply) _____ Engineering _____ Finance _____ Service
_____ Retail _____ Marketing _____ Distribution
_____ Operations _____ Other

Industries: _____

Positions: _____

Present Employer: _____ Position: _____

Address: _____ City: _____ State: _____ Zip: _____

Salary: \$ _____

Is there another decision-maker or partner who will be involved in new business? If so, who, and what is relationship? _____

TYPE(S) OF BUSINESSES PREFERRED

A) _____

B) _____

C) _____

D) _____

Cash Flow/Income required per year: \$ _____ Amount Reserved for Down payment: \$ _____

Reason for purchasing business: _____

I would like to purchase a business by: _____

(Date)

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Name: _____ Street: _____
City: _____ State: ___ Zip: _____
Home Phone: () _____ Cell: () _____ Business Phone: () _____

ASSETS

Cash on hand & in bank(s):

Bank Name #1:	_____	\$
Bank Name #2:	_____	\$
Bank Name #3:	_____	\$
U.S. Government Securities:	_____	\$
Accounts, Loans & Notes Receivable:	_____	\$
Cash Surrender Value Life Insurance:	_____	\$
Value of Business(es) Owned:	_____	\$
Other Stocks & Bonds:	_____	\$
Real Estate:	_____	\$
Automobiles: #:	_____ Value: _____	\$
Household Furnishings and Personal Effects:	_____	\$
Other Assets (itemize):	_____	

	_____	\$
	TOTAL ASSETS:	\$ _____

LIABILITIES & NET WORTH

Notes Payable:	_____	\$
Liens on Real Estate:	_____	\$
Other Liabilities (itemize):	_____	
	_____	\$
	TOTAL LIABILITIES:	\$ _____
	NET WORTH:	\$ _____

SOURCE(S) OF INCOME

Salary:	_____	\$
Dividends & interest:	_____	\$
Bonus(es) & Commission(s):	_____	\$
Real Estate Income:	_____	\$
Other Income:	_____	\$
	TOTAL INCOME:	\$ _____

The undersigned certifies that this information was provided by him/her and is true and correct.

Signature: _____

Date: _____