

Information Needed to Professionally Represent

- Profit and Loss statements and Balance Sheets for the last three years
- Federal Income Tax Returns on business for the last three years
- Copies of Sales Tax filings with the state of Florida for the last three years
- Gross revenues for each of the twelve most recent months of operation
- Complete list of furniture, fixtures and equipment to be sold with the business
- Copies of all equipment leases and assumable loans on the business
- Copy of lease on the business property
- Regarding the real estate for the business (if applicable):
 - ✓ A copy of the most recent appraisal on the business property
 - ✓ A copy of the lease if you decide to lease the property to a new owner
 - ✓ A copy of your most recent property tax statement
- Marketing material (e.g., pictures, advertising, price lists, etc.)
- Payroll records for the last two years
- Copies of all Business Licenses

These items will not be shared with buyers unless we are under contract:

- Copy of the most recent business appraisal (if applicable)
- Copy of Business Plan / Marketing Plan
- Itemization of all indebtedness and obligations against the business
- Franchise or dealership agreement and required disclosure forms (if applicable).
- Copies of any special agreements or contracts with vendors, suppliers, employees, etc.
- Employee roster with names, ages and length of service with business and benefits.
- Breakdown of clients - Concentration of clients - Geographical location of clients.

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