

SOUTHWEST

BUSINESS  BROKERS



WHAT PROSPECTIVE BUYERS WILL NEED:

- ☐ 3 years of P&L (Profit and Loss) financial statements including this Y-T-D
- ☐ 3 years of tax returns (business or business portion of personal tax returns)
- ☐ Any lease agreements if applicable
- ☐ Balance sheet
- ☐ 3 years of bank statements
- ☐ Any additional Bank Records (Credit card statements, etc.)
- ☐ Asset List – Inventory, DBA, equipment, etc. that is transferable with the business
- ☐ Business/Owner Bio – How long has the business been in operation? How long have you owned the company? (Etc)

ADDITIONAL ITEMS THAT MAY BE NEEDED:

- ☐ Sales information (where do your sales come from? What is the percentage? Etc.)
- ☐ Sales by customer
- ☐ Accounts receivable/payables
- ☐ License/contracts
- ☐ Staff Bios/Information/Pay Details