TRUFORTE BUSINESS GROUP
BUSINESS SALES · MERGERS · ACQUISITIONS
"Trust is the strength of healthy relationships"

# ASSESSMENT OF VALUE

Thank you for your interest in allowing us to provide you with an Opinion of Value for your business with the possible intent to sell. A good information package is very helpful in this process. Please provide as much of the following information as possible so we may help you maximize the value of your business.

General information

Business Name _____

d.b.a._____

- # of Years owned ___Yrs Established_____
- Gross Sales $_____
- Employee FT____PT_____Mgr(s)___

Reason for sale_____

- Tax Returns (3 years if possible)
- Financial Statements (3 years if possible)
- YTD Interim Financial statement
- Approx. resale inventory at cost $_____
- Equipment Lease(s) Yes _____ No _____
  Note _____
- Equipment List Yes _____ No _____
  Notes_____
- Fixture List Yes _____ No _____
  Notes _____
- Lease(s) (Premise) Yes _____ No_____
  Notes _____
- Customer List (A general description) or If this is a service business please include:
  - Number of Contracts
  - Current Monthly billing by customer
- Real estate property description if included
  Description_____
- Marketing Material Yes _____ No_____
  Notes_____

Comments:_____

**Your information is kept highly confidential**

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