



Initial Valuation Information Requirements

We understand if all the information requested is not currently available; please provide as much as you can to enable us to prepare the most accurate valuation possible.

- Year-to-Date Profit & Loss Statement and Balance Sheets
- Tax Returns for the last 3 years
- Year business started
- Number of employees
- Is building owned? If so, is it in the company's name or individual owner(s)?
- An estimate of the value of any machinery and equipment not shown on the Balance Sheet
- Ownership structure

We will review your financial information and contact you if we have further questions. In an effort to show true profitability, we will be adding back to the profit shown, any expenses that are identified yet are not necessary for the operation of the business. Examples might be the owner's vehicles charged to company, personal travel, meals, family members on the company's payroll but not active in the business, or active but receiving a salary that is more than market for the job being done, plus any additional perks taken.