

# Business Information

Company Name:

DBA (if applicable)

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Business Site Address

Nature of Business

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Tax ID Number

Telephone

Email Address

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Type of Entity:  Corporation  Partnership  LLC Other \_\_\_\_\_

Does the business operate under a franchise or licensing agreement:  Yes  No

Does the business have any dealer, retailer, or management agreement?  Yes  No  
if yes, provide copy of the agreement

## Ownership & Management

Name

Title

M/F

% Ownership

Email

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## History and Background of Business

1. Why are you selling the business?

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2. Describe the company/business (past and present, type of business)

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3. Describe Management and/or Key Employees of the Business?

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4. Describe your products or services (What is your trade area? Are your sales seasonal?)

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5. List key suppliers / vendors (What would you do if you lost a key supplier?)

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6. Do your vendors / suppliers provide terms for your business? Please include list of vendors/suppliers and terms.

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7. How many days of inventory, if applicable, does your business usually have on hand?

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8. What geographic / demographic areas does your business serve?

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9. Describe your customers (Who? Market Segment? Geographic Market Area? Key Customers?)

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10. Does any customer represent greater than 10% of your revenue? Yes\_\_\_\_ No\_\_\_\_  
If yes, provide customer details including general information such as sales volume, public vs private, years in business, etc. and how long you have been servicing this customer (please use a separate page if necessary)

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11. How do you market your product/services? Please include information about distribution channels, suppliers with concentrations, seasonal swings, etc.

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12. List at least three major competitors (How does your business differ from theirs?)

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13. What, if any, is your competitive advantage

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15. What is the size (SF) of your current facility? \_\_\_\_\_

How many locations do you currently have? \_\_\_\_\_

Is the business now (or to be) located in leased or owned space?

Leased |\_\_| Owned |\_\_|

If leased, when does the lease expire?

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Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Title: