

A.B.B. of Southwest Florida, Inc.
AMERICAN BUSINESS BROKERS
Business Sales, Mergers and Acquisitions

"Assisting Buyers and Sellers in fulfilling their American Dream"

Value Assessment Form for Listings
(All of your information is considered and kept Highly Confidential)

Thank you for your interest in having us 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. It will also speed up the process for you if you can provide us with information prior to our meeting. That is not always possible but if it is available you can either send it to us by email: abb@abbrokers.com or fax to: 877-858-0047 or regular mail to: ABB of Southwest Florida, Inc. 8191 College Parkway, Ste 306, Fort Myers, Florida 33919

INFORMATION REQUESTED FROM THE CLIENT

During (hopefully prior to) our Brokers or Associates listing appointment we would like to obtain as much of the following information as possible:

• General information	*	Years in Business _____	Sales _____	#of employee _____
• Financial Statements	*	3 years if possible		
• Tax Returns	*	3 years if possible		
• Equipment Lease(s)	*	Yes _____ No _____	Notes _____	
• Equipment List	*	Yes _____ No _____	Notes _____	
• Fixture List	*	Yes _____ No _____	Notes _____	
• Customer List	*	A general list or if service business * contracts * Monthly billing by customer		
• Lease(s) (Premise)	*	Yes _____ No _____	Notes _____	
* Real estate property description if included or applicable _____				
• Marketing Material	*	Yes _____ No _____	If no, explain _____	

TO BE PREPARED BY LICENSED BROKER OR LICENSED ASSOCIATE

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|---|
| <ul style="list-style-type: none">• Business Listing Information detail• Business Valuation and Letter• Corporate Resolution• Broker Agreement |
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Comments:
