



Broker: Hank Bockus
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CONFIDENTIAL BUYER PROFILE

INDIVIDUAL(S)

Today's Date: ___/___/_____

Name: Mr. ___ Ms. ___ Dr. ___ First: _____ Last _____

Company: _____ Address: _____

City: _____ State/Province: _____ ZIP: _____ e-Mail: _____

Phones: Office: (____) _____ Cell: (____) _____ Fax: (____) _____

1. What is your background? _____

2. How did you hear about us? Ad: ___ Social Media : ___ Friend: ___ Advisor: _____
 Other: _____

3. What business did you contact us about? _____ / _____ / _____

4. Are you currently employed? Yes: ___ No: ___ If so, where? _____

5. The reason I am interested buying a business: Work/Own a Business: ___ Investment: ___ Increase my income: ___
 To expand my current business: ___ Other: _____

6. The reason I want to buy a business at this time: I sold my business: ___ I am selling my business: ___ Got laid off: ___
 It's my life's dream: ___ I just received some cash: ___ Other: _____

7. I am interested in:

	Yes	No	Don't Care		Yes	No	Don't Care
Working in the business day-to-day				National Franchise			
A Cash Business				Relocatable			
A Home- Based Business				Turnaround/Distressed			

8. I have interest in the following general types of businesses:

Automotive		C-Store/Gas Station		Professional	
Bar/Lounge		Distribution		Retail	
Coin Laundry/Vending		Manufacturing		Service	
Construction		Marketing		Technology	
Other:					

9. Specific Businesses:

	First Choice	Second Choice	Third Choice
I am interested in these			
I am NOT interested in these			

10. Locations Preferred: Any Location: ___ OKC: ___ Moore: ___ Tulsa: ___

Other: _____

11. Have you ever:

	Yes	No	

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Owned a business before?			When? What type?	
Declared personal bankruptcy?			When? Explain	
Had a judgment against you?			When? Explain	

12. Has your family ever owned a business before? Yes: ___ No: ___ If yes, what type?: _____
13. How long have you been looking for a business? Now: ___ 1 Mo.: ___ 3 Mo.: ___ 6 Mo.: ___ Over 6 Mo.: ___
14. When are you planning to buy a business? Now: ___ 1 Mo.: ___ 3 Mo.: ___ 6 Mo.: ___ Over 6 Mo.: ___
15. Who else will be involved in making the decision? Partner: ___ Friend: ___ Relative: ___ Spouse: ___ Children: ___
16. Who will help you run the business? Partner: ___ Friend: ___ Relative: ___ Spouse: ___ Children: ___
17. How much ANNUAL income do you need from the business? \$ _____
18. If you found a business you liked, how much CASH do have to invest the business? \$ _____
19. When will these funds be available? Now: ___ 1 Mo.: ___ 3 Mo.: ___ 6 Mo.: ___ 1 Year: ___ Other: _____
20. What form are these funds in? Cash: ___ CDs: ___ Stock: ___ Bonds: ___ Retirement: ___ Real Property: _____
21. How much do you want your TOTAL investment to be? \$ _____
22. How will you finance your total investment? Cash: ___ Bank Loan: ___ SBA Loan: ___ Private Investor: _____
23. Who will help with financing? No One: ___ Partner: ___ Friend: ___ Family: ___ Bank: ___ Other: _____
24. How is your credit? I don't know: ___ Excellent: ___ Good: ___ Fair: ___ Bad: ___. My FICO score is: _____
25. What is you approximate net worth? \$ _____
26. If you found the right business, can you make an offer to buy a business now? Yes: ___ No: ___
27. Have you ever work with a professional business broker before? Yes: ___ No: ___ If yes, when? _____
28. Do you have any hobbies that might tie in with a business? If so, explain: _____
29. What special training or schooling have you completed that might be useful with a business career? If so, explain: _____
30. Do you have any physical limitations that might affect the type of business to buy? If so, explain: _____
31. What do you like or dislike about your job? _____
32. What are your strong points relating to management, marketing, accounting, etc? _____
33. What size staff would you prefer to manage? Small 1 to 5: ___ Medium 10 to 20: ___ Large over 20: _____
34. Additional information that we should be aware of: _____

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35. Please review and sign the "Confidentiality Agreement." By signing this agreement, you agree not pass any information about any businesses that we share with you along to others. Remember, it is better to buy a business that no one else knew was for sale. Also, you are agreeing not to speak with the employees; they are a valuable asset.

36. Please review the "Steps to Owning a Business." This explains how we ensure a smooth transaction for everyone.

37. Please complete the "Buyer Profile (Financial)." Remember, the financial information need not disclose everything you have, but you do need to disclose enough to qualify for the businesses you are looking for. It makes the Seller a lot more comfortable, when opening their confidential financial records to you, knowing that you are able to buy the business if it appeals to you. You can bring this back to our next meeting, or fax it to us at the number below.

Buyer Profile for (Please Print): _____

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