# INITIAL ASSESSMENT

Please complete and return for us to determine the best option.
Be honest and make your best assessment of the following factors:

**Number of years the business has been operating** .....

**Number of years the current owner has operated the business** .....

**Amount of competition in the market**

*0 = A Lot, 4 = None*

0 — 1 — 2 — 3 — 4

**Sales**

*0 = No Growth, 4 = Strong Growth*

0 — 1 — 2 — 3 — 4

**Industry growth trend**

*0 = Declining, 4 = Growing*

0 — 1 — 2 — 3 — 4

**Market Share**

*0 = Small, 4 = Largest Portion*

0 — 1 — 2 — 3 — 4

**Location and facilities**

*0 = Poor, 4 = Excellent*

0 — 1 — 2 — 3 — 4

**Management**

*0 = Under Staffed, 4 = Above Avg*

0 — 1 — 2 — 3 — 4

**Marketability**

*0 = Poor, 4 = Excellent*

0 — 1 — 2 — 3 — 4

**Litigation**

*0 = Some, 4 = None*

0 — 1 — 2 — 3 — 4

**Historical profit trend**

*0 = Low, 4 = High*

0 — 1 — 2 — 3 — 4

**Customer Base**

*0 = Not Steady, 4 = Wide & Growing*

0 — 1 — 2 — 3 — 4

**Ease of business replication**

*0 = Easy, 4 = Difficult*

0 — 1 — 2 — 3 — 4

**Business Type**

*0 = Little Demand, 4 = High Demand*

0 — 1 — 2 — 3 — 4

**Amount of risk**

*0 = High, 4 = Low*

0 — 1 — 2 — 3 — 4

**Accuracy of Financials**

*0 = No immediate access, 4 = Reconciled, immediately available*

0 — 1 — 2 — 3 — 4

*Please save and email to hank@bockusconsulting.com*

BOCKUS CONSULTING
BUSINESS BROKERAGE

# BUSINESS QUESTIONNAIRE

Company name : ..... Franchise? .....

Contact name: ..... Position title: .....

Mailing address: .....

City: ..... State: ..... Zip: .....

Private phone or cell number: ..... Web address: .....

E-Mail address: .....

Days and hours of operation:

M: ..... T: ..... W: ..... T: ..... F: ..... S: ..... S: .....

Ownership makeup and percentages : .....

Accounting software: .....

Other locations owned: .....

Type of legal entity: (S Corp, C Corp, LLC, etc.) .....

Why do you want to sell? .....

.....

Ever tried to sell before? ..... When? .....

What happened? .....

Licenses required to operate your business : .....

Number of employees: FT ..... PT ..... Will they stay? .....

Do they know? .....

Approximate value of inventory $ .....

Social media following: Facebook: ..... Instagram: ..... Pinterest: .....

Email list #: ..... Web traffic (per month): .....

Upside potential for new owner: .....

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.....

Would you train new owner? ..... How long? .....

How many hours do you work a week? .....

Describe your primary tasks and roles in the company. .....

.....

.....

If you had to replace yourself in your company, what is the Fair Market Salary annually for your position? .....

What were your overall sales in the previous 3 years (full 12 month)? .....

Last Year: ..... Year 2: ..... Year 3: .....

Were you profitable last year? ..... What was your most recent year net profit/loss: .....

Your idea of listing price $ ..... What is this based on? .....

Other information you think would be valuable to know: .....

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