



## CONFIDENTIAL PURCHASER PROFILE

Name: \_\_\_\_\_ Phone: (Best #) \_\_\_\_\_ (W) \_\_\_\_\_

E-Mail: \_\_\_\_\_

Address \_\_\_\_\_

Present occupation: \_\_\_\_\_ Marital status: \_\_\_\_\_

Reason for acquiring business \_\_\_\_\_

Have you ever owned a business before? \_\_\_\_\_ If so, Type? \_\_\_\_\_

Desired date to take possession: \_\_\_\_\_

Preferred location: \_\_\_\_\_

Type of business preference: 1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

How long have you been looking for a business? \_\_\_\_\_

Prior business experience and education: \_\_\_\_\_

Will anyone assist you in operating the business or deciding which business to acquire? \_\_\_\_\_

If so, who? \_\_\_\_\_

Who referred you to this office? \_\_\_\_\_

### **Financial Information** (Please complete the Confidential Personal Financial Statement on the second page.)

How much capital do you have available to purchase a business? \$ \_\_\_\_\_

Source of funds: \_\_\_\_\_

Is it available today? \_\_\_\_\_ If not, when? \_\_\_\_\_

Income needs and expectations: \_\_\_\_\_

Would you borrow against your home equity to purchase a business? \_\_\_\_\_

Present net worth: \_\_\_\_\_

Do you have status to live and work in the USA? \_\_\_\_\_

**Comments:** \_\_\_\_\_

\_\_\_\_\_

# Confidential Personal Financial Statement

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

## Assets:

Cash on hand in banks	\$	_____
Publicly traded securities	\$	_____
Accounts, loans and notes receivable	\$	_____
Value of business owned	\$	_____
Real estate holdings	\$	_____
Other assets (itemize): _____	\$	_____
_____	\$	_____
_____	\$	_____

**Total Assets** \$ \_\_\_\_\_

## Liabilities:

Notes payable	\$	_____
Liens on real estate	\$	_____
Other liabilities (itemize): _____	\$	_____
_____	\$	_____
_____	\$	_____

**Total Liabilities** \$ \_\_\_\_\_

**Net Worth** \$ \_\_\_\_\_

## Sources of Income:

Salary	\$	_____
Dividends and interest	\$	_____
Bonuses and commissions	\$	_____
Real estate income	\$	_____
Other income (itemize): _____	\$	_____
_____	\$	_____
_____	\$	_____

**Total Income** \$ \_\_\_\_\_

The undersigned certifies that the information provided to InterMountain Business Brokers is true and correct.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

PLEASE SCAN AND E-MAIL THE COMPLETED FORM TO:  
[chris@intermountainbusinessbrokers.com](mailto:chris@intermountainbusinessbrokers.com)

OR FAX THE COMPLETED FORM TO: 303-395-3801