



# Sunbelt Business Brokers, Greater Bay Area

**FINANCIAL INFORMATION:** \_\_\_\_\_ (Please attach prepared financial statement, if available)  
(Name)

What is your current annual income? \$ \_\_\_\_\_

What are your income expectations the first year of owning your own business? \$ \_\_\_\_\_

Have you ever filed bankruptcy? \_\_\_\_\_ Had a foreclosure? \_\_\_\_\_ Had a judgment filed against you? \_\_\_\_\_

Is there any reason you might be declined a loan for a business acquisition? \_\_\_\_\_

Will anyone advise you in the review of business records and the decision to purchase any business? \_\_\_\_\_

What is the down payment amount and the source of funds that you **are prepared to substantiate** at the time of making an offer? \$ \_\_\_\_\_ Source: \_\_\_\_\_

Do you have a financial partner or any other personal source of investment capital?  Yes  No

If Yes, please explain: \_\_\_\_\_

Do you have additional income sources?  Yes  No

If Yes, please explain: \_\_\_\_\_

## NET WORTH:

### ASSETS

Cash in checking accounts \$ \_\_\_\_\_

Cash in savings accounts \$ \_\_\_\_\_

Stocks and bonds \$ \_\_\_\_\_

IRA's, retirement plans, 401K's \$ \_\_\_\_\_

Cash surrender of life insurance \$ \_\_\_\_\_

Real Estate, home \$ \_\_\_\_\_

Real Estate, other \$ \_\_\_\_\_

Automobile(s) \$ \_\_\_\_\_

Your own business \$ \_\_\_\_\_

Appraised collectibles \$ \_\_\_\_\_

Money due you \$ \_\_\_\_\_

Other assets (describe): \$ \_\_\_\_\_

Total: \$ \_\_\_\_\_

### LIABILITIES

Notes payable to banks \$ \_\_\_\_\_

Notes payable to finance co's \$ \_\_\_\_\_

Real estate indebtedness \$ \_\_\_\_\_

Automobile(s) indebtedness \$ \_\_\_\_\_

Owing on life insurance \$ \_\_\_\_\_

Charge accounts \$ \_\_\_\_\_

Credit Cards \$ \_\_\_\_\_

Taxes payable \$ \_\_\_\_\_

Other liabilities (describe): \$ \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Total: \$ \_\_\_\_\_

**NET WORTH** (total assets minus total liabilities): \$ \_\_\_\_\_

**TOTAL INVESTMENT** \$ \_\_\_\_\_

*I certify that the above information is true and correct and acknowledge receipt of a copy of this profile.*

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**