

## **DOCUMENTS LIST NEEDED TO COMPLETE THE VALUATION & MASTER LISTING**

- **Profit and loss statements and balance sheets for the last three years.**
- **Latest interim financial statements.**
- **Corporate tax return, Schedule C, or Partnership tax return for at least 3 years.**
- **List of assets to be included in the sale.**
- **List of assets to be excluded from the sale.**
- **Schedule of all indebtedness of the business.**
- Details of any patents, copyrights, trademarks, or contracts of value.
- Legal description of any real property included in the sale.
- Details of lease agreements.
- Any employment contracts, representative agreements, etc.
- Organizational chart (job description and rates of compensation).
- Details of any pension and/or profit sharing plans.
- Details of all insurance policies.
- Accounts receivable and Accounts Payable aging reports.
- Inventory information
- Assets not appearing on the balance sheet.
- Brochures, ads, articles, web site address etc.
- **List of any contracts for services.**
- Any other data that you believe might be relevant to a buyer prospect