

# CONFIDENTIAL PURCHASER PROFILE

## (Individual Purchaser)

Date:	
Agent:	
Source:	

Name: \_\_\_\_\_ Spouse / Partner: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone (home): \_\_\_\_\_ Phone (business): \_\_\_\_\_ Phone (cell): \_\_\_\_\_

Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_ Is it private? Yes  No

How did you first hear about First Business Brokers, Ltd.? \_\_\_\_\_

Are you a United States Citizen? Yes  No

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

Reason for acquiring a business: \_\_\_\_\_

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

Prior business experience/education: \_\_\_\_\_

Have you ever owned a business before? \_\_\_\_\_

If yes, what type? \_\_\_\_\_

What type of business would interest you? 1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

Desired annual income: \$ \_\_\_\_\_

Will anyone assist you in operating the business? \_\_\_\_\_ If yes, relationship? \_\_\_\_\_

### FINANCIAL INFORMATION

*(As a prospective purchaser of a business, you will be receiving detailed and proprietary financial information, including business income tax returns. Prior to receiving this information, First Business Brokers, Ltd.® and its clients require that you indicate your financial capabilities both below and on other side of this form. This information will remain confidential until you approve its release to lenders or other necessary parties.)*

What is the MAXIMUM amount you have allocated for a DOWN PAYMENT? \$ \_\_\_\_\_

SOURCE of down payment? \_\_\_\_\_ Present NET WORTH? \$ \_\_\_\_\_

Is down payment available today? \_\_\_\_\_ If not, when will it become available? \_\_\_\_\_

Are additional sources of financing in place? \_\_\_\_\_ If yes, describe: \_\_\_\_\_

Bank References:	Institution	Relationship Manager	Branch Location	Phone

**PLEASE COMPLETE ADDITIONAL FINANCIAL INFORMATION ON THE OTHER SIDE**

Please return this form to:



**FIRST BUSINESS BROKERS, LTD.**  
 303 South Cascade Avenue, Suite 200  
 Colorado Springs, Colorado 80903  
 Phone: 719.635.9000 | 800.395.7653 | Fax: 719.635.4988

# CONFIDENTIAL PURCHASER PROFILE

- Continued -

**Note: If this information is not completed, detailed information on specific businesses will not be available to you.**

Assets		Income	
Cash (on hand and in bank)	\$	Salary	\$
Publicly Traded Securities		Dividends and Interest	
Accounts, Loans, and Notes Receivable		Bonuses and Commissions	
Cash Surrender Value of Life Insurance		Real Estate Income	
Value of Businesses Owned		Other Income (itemize):	
Value of Home			
Value of Other Real Estate			
Retirement Plans		<b>Total Income:</b>	\$
Automobiles (How many? ____)		<b>Other Key Financial Information:</b>	
Household Furnishings / Personal Effects			
Other Assets (itemize):			
<b>Total Assets:</b>	\$		
<b>Liabilities:</b>			
Notes Payable	\$		
Home Mortgage			
Other Real Estate Loans			
Credit Card Balances			
Other Liabilities (itemize):			
<b>Total Liabilities:</b>	\$		
<b>NET WORTH:</b>	\$		

Have you ever filed bankruptcy?  Yes  No      If yes, when? \_\_\_\_\_

Describe the circumstances: \_\_\_\_\_

What type?  Chapter 7  Chapter 11

Credit Reporting Score (if you know) \_\_\_\_\_ Other credit issues? \_\_\_\_\_

The undersigned hereby acknowledges and certifies that the preceding information is true and correct to the best of his/her knowledge.

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

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

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