



Depending on the type of property or business involved, we utilize the following information to help us design the best program for you.

PLEASE COMPLETE FORM FOR EACH PROERTY.

Name of Property _____
Address _____
City, State, Zip _____

Owners names _____
Owners Phones _____
Owners Email _____
Property owner shown on property tax appraisal _____

2nd Owner _____
Owners Phones _____
Owners Email _____

Contact person Name _____
Phones _____
Email _____

1. Actual operating statements for 3 yrs.
2. Projected operating statement for current yr.
3. Deferred maintenance needed and approximate cost _____

4. List of major repairs completed 2 yrs

5. Any known problems with property or equipment? _____

6. Reason for sale _____

7. Why is this a property we should buy ?

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8. What makes this a compelling purchase? _____
 9. List of major competitors in area? _____
 10. List of major equipment and approximate age _____
 11. Survey
 12. Environmental report if available
 13. Any leases
 14. Any warranties
 15. Latest Appraisal _____
 16. Pictures
 17. Property for sale in the area for comparison _____
 18. Bank Debt Amount? _____
 19. Bank Debt Terms _____
 20. Bank Debt Assumable? _____
 21. Permission to contact bank officer _____
 22. Bankers name and contact information _____
 23. Permission to contact CPA for depreciation values
 24. CPA name and contact Information _____

I realize this is a lot of information and work on the front end, but the more we share with each other, the easier is for me to sell and get the best price for you..

Thanks for your help.

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