

INFORMATION REQUIRED FOR PRELIMINARY VALUATION

List of documents needed for conducting preliminary valuation.

FINANCIAL	Profit and loss statements for past 3-5 years
	Tax Filings for the past 3 to 5 years: Schedule C (sole proprietorship) or 1065 (partnership) or 1120 (C Corp) or 1120S (S Corp)
LEASE(S)	Current lease(s)
	Proposed new lease(s) - if any
OTHER	Any licensing, franchise agreements with financial consequences
	Notes or loans on the business

Preliminary valuations can be done with incomplete information. However, please note that the more information you can provide, the more accurate the valuation is likely to be.

Once you have all (or most) of these documents, you can bring them in or send them to our attention

In Person: 11707 Fair Oaks Blvd., Suite 201, Fair Oaks, CA 95628

By Mail: P.O. Box 60917, Sacramento, CA 95860-0917

By Fax: 888-502-3817

By E-mail: cr95630@gmail.com (preferred formats: PDF, DOC, XLS, QuickBooks)