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DSLIV "Short Form" Business Valuation Information Request

- Current balance sheet and year-to-date profit & loss statement for the business
- Current accounts payable and accounts receivable balances (less allowance for uncollectibles and contractual adjustments, etc.)
- Estimated fair market value of all fixed assets owned by the business, including copies of prior appraisals of real and personal property (if applicable)
- Current depreciation schedule for fixed assets
- Corporate tax returns for the years 2003 thru 2007
- CPA-prepared financial statements (if prepared) for the years 2003 thru 2007
- Schedule of owner(s) salary and fringe benefits for the years 2003 thru 2007
- Copy of owner(s) resumes or summary of education, experience, job descriptions, etc.
- Estimate of owner(s) average work hours & duties
- Estimated reasonable replacement salary for owner(s)
- Brief description of the business (employees, services/products, competition, future prospects)
- Brief history of the business (major events, new products, significant changes)
- Copies of brochures or other promotional materials