



**BLUEGRASS
BUSINESS
ADVISORS**

Bluegrass Business Advisors

300 East Main Street, #220, Lexington, KY 40507

Office 859-276-5300 FAX 859-246-0027

www.bluegrassbusinessadvisors.com

**CONFIDENTIAL
BUYER PROFILE**

Date: _____ Account Exec.: _____

Background:

Name: _____ Phone: _____

Address: _____ City: _____

Spouse's Name: _____ U.S. Citizen: Yes ___ No ___

Current Business or Employment: _____

Phone: _____ Can you be Contacted There? _____

Present or former occupation(s): _____

Previous business ownership? No ___ Yes ___ If Yes, describe: _____

Trade, professional, management experience or other special training: _____

Buyer Search Information:

What brought you into our office? _____

Primary types of business you are interested in: _____

Other types of business you may consider owning: _____

Previous business search: _____

How long have you been looking for a business? _____

What have you seen? _____

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CONFIDENTIAL BUYER PROFILE *(continued)*

What did you like about them? _____

What did you not like about them? _____

When do you plan on taking possession of a business? _____

Geographic locations preferred: _____

What are the things you feel your business must have, (i.e. size, product, service, employees, sales volume, hours, etc.)? _____

Based on past business/occupational experience, my strengths are: _____

Additional information helpful to the recommendation of a business suited to personal and financial goals:

Will you be: owner/operator _____ Absentee _____ Partner _____

Will family members assist or work in the business? _____

Explain _____

Profile Evaluation:

How many hours per day do you want to work? _____

How many days (per week)? _____ (per month)? _____

Attitude toward incurring debt: _____

How do you plan to finance the purchase? _____

How much money is set aside for the down payment? \$ _____

How much income is expected from a business? \$ _____

Minimum income amount needed from a business? \$ _____

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CONFIDENTIAL BUYER PROFILE *(continued)*

Investment Capital Sources:

Cash _____ Equity \$ _____
 Investment _____ Other \$ _____

Are there any assets that you may wish to convert to cash or would consider in an exchange situation? Explain _____

Financial Information:

<u>ASSETS</u>	<u>LIABILITIES</u>
Cash on Hand \$ _____	Notes Payable \$ _____
Cash in Banks \$ _____	Owing on Real Estate \$ _____
RE., Home (present value) \$ _____	Auto loan \$ _____
Other RE. (present value) \$ _____	Other \$ _____
Notes Owed You \$ _____	_____ \$ _____
Automobile \$ _____	_____ \$ _____
Securities \$ _____	TOTAL
Insurance (cash value) \$ _____	LIABILITIES \$ _____
Other Assets \$ _____	
TOTAL ASSETS \$ _____	NET WORTH \$ _____

Income Sources:

Salary \$ _____	Pension \$ _____
Real Estate \$ _____	Other \$ _____
Interest \$ _____	Total \$ _____

The above information is true and correct to the best of my knowledge.

(Signature) _____
(Date)