



INFORMATION REQUIRED FOR SALE OF A BUSINESS

To start marketing to sell your business, we prepare an information package to present to qualified purchasers. Your co-operation in promptly providing the following mandatory and optional material is required:

MANDATORY

_____ **Legal Ownership :** Legal Owner's Name, Corporate Officers and Shareholders.

_____ **Financial Statements:** Complete Year-End Statements and any monthly interim statements; also monthly year-to-date sales totals. (As an alternative, if complete up-to-date statements are not available, a notarized waiver on our standard form).

_____ **Lease:** A complete copy from the beginning of the lease term, including amendments (a survey of the land if available).

_____ **Chattels and Equipment:** A list of owned chattels and equipment and those that are on lease, loan or rental (with a copy of any of the loan or lease agreements). This list should include a Description, Quantity, Model #, Serial #, Condition, and Terms not included in the sale.

_____ **Liquor Licenses:** (or list of permit numbers) photocopies preferred.

_____ **PST/GST or HST :** Numbers.

OPTIONAL

_____ **Menus:** Breakfast, Lunch, Dinner, Liquor, Wine, Cocktail List. Etc.

_____ **Promotional Materials:** Reviews from Magazines or Newspapers.

_____ **Photos**

_____ **Employee Summary:** and/or schedule (who, what position, hourly wages or salaries, hours worked, date of employment etc.)

_____ **Floor Plans:** preferably with seating shown (mechanical, electrical, lighting, plans etc. if available).

_____ **Miscellaneous Information:** That would assist us in marketing your business.

Thank you!