



# SUNBELT<sup>®</sup> BUSINESS BROKERS

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**CONFIDENTIAL**

Name(s) \_\_\_\_\_

### Assets

Cash on Hand and in Banks	\$
U.S. Government Securities	\$
Account, Loans and Notes Receivable	\$
Cash surrender Value of Life Insurance	\$
Value of Business Owned	\$
Other stocks and Bonds	\$
401K, IRA, or SEP IRA (in certain circumstances retirement accounts can be used toward the purchase of a business without taxes or penalties.)	\$
Real Estate	\$
Automobile – Number ( )	\$
Household Furnishings and Personal Effects	\$
Other Assets (Itemize)	\$
	\$
	\$
	\$

**Assets** \$ \_\_\_\_\_

### Liabilities and Net Worth

Notes Payable	\$
Liens on Real Estate	\$
Other Liabilities (Itemize)	\$
	\$
	\$

**Total Liabilities** \$ \_\_\_\_\_

### Net Worth

\$ \_\_\_\_\_ **Source of Income**

Salary	\$
Dividends and Interest	\$
Bonus and Commissions	\$
Real Estate Income	\$
Other Income	\$

**Total Income** \$ \_\_\_\_\_

The undersigned certifies that this information was provided by him/her and is true and correct. The undersigned understands this information may be provided to a Seller of a business and its agents.

Signature(s) \_\_\_\_\_

Date: \_\_\_\_\_

"The above set forth information has been secured directly from the above named individual. Sunbelt Business Advisors has done no due diligence or investigation on the information and in no way guarantees the accuracy of such information, nor does it warrant any assumptions as true and correct."

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