Key Documents Checklist:

1. Explanation of product(s), target customer, sales & service process
2. Description of current ownership interests, contact info, agreements.
3. Profit and Loss statements for the business - 3 most recent years
4. Federal Income Tax returns for the business - 3 most recent years
5. Complete List of machinery, fixtures and equipment - purchase cost/date
6. Building/property leases, property tax, and other related documents
7. List of any loans of the business, security covenants, original amounts, balance amounts, payment schedules
8. Machinery/equipment leases, property tax and other related documents
9. Copy of any franchise agreement(s), partnership, financial agreements or covenants, if applicable
10. Copy of any intellectual property, software licenses and agreements
11. List of materials, supplies, work-in-process inventory on hand, software licenses with quantity and $$ values
12. List of customers with recent sales records - 3 most recent years
13. List of suppliers, vendors of materials or services and other advisors
14. Copy of sales and advertising materials, logos, artwork, images, website and social media locations
15. Employees list, job titles, hiring dates, wages, relationships & agreements
16. List of awards, recognitions, special promotions that impact the business reputation

Avoid the Rocks...

Coast to Coast Business Advisors LLC has the experience you need to avoid the rough waters and rocky shores of buying or selling a business. Some activities in life need an expert. You certainly would not consider eye surgery without an ophthalmologist that you trust.

Selling a business after a lifetime of building effort is putting it all on the line…one time.

Our Strategic Business Offering program is the premier way to make certain that your VISION is not impaired and that you get the best value in a sale transaction.

Preparation is the absolute key to a successful business sale and full satisfaction to buyers, sellers, customers, employees, family and advisors.