



Snapshots™

COLLECTION INFORMATION ON A SMALL BUSINESS

When deciding to sell or transfer your business, the Valuator and any prospective purchasers will require a lot of information about the company to make a value determination.

Having this information collected and ready to hand over will expedite the process. Here is a checklist to help you get ready for your sale.

- Financial statements (preferably audited)
- Organizational chart
- Incorporation documents
- Product and service catalogues and other marketing materials
- Names of auditors, legal counsel and other outside advisors
- Banking agreements and details of any debt covenants
- Federal and provincial income tax returns
- Any previous valuations conducted and documentation of any offers received in the past
- Shareholder agreements
- Lease agreements
- Pension plan details where applicable
- Insurance agreements
- Stock option agreements
- Outstanding contracts
- Documentation of any legal action being taken by the company or against the company