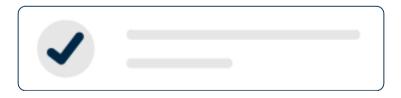


Business Insights Fact Finder

Please complete this brief form to get insights on how to better protect, grow, and plan for your business.

Business Name:	
Entity Structure:	
Industry:	









We are here to help

Earnings

Reference your profit/loss and income statements to provide a picture of the earnings of the company.

Work with your accountant and advisor to identify **Adjustments to Normalize Earnings.***

Profit & Loss	2023	2022	2021	
Net Income	\$	\$	\$	
Revenue	\$	\$	\$	
Cost of Goods Sold	\$	\$	\$	
Operating Expenses	\$	\$	\$	
Non-Operating Expenses	\$	\$	\$	
Interest Expense	\$	\$	\$	
Depreciation	\$	\$	\$	
Amortization	\$	\$	\$	
* Adjustments to Normalize Earnings				
Owner's Compensation	\$	\$	\$	
Profit Sharing Expenses	\$	\$	\$	
Other Discretionary Expenses	\$	\$	\$	

Assets & Liabilities

Reference your balance sheet statements to provide a snapshot of your assets and liabilities of the company.

Assets	2023
Cash and Cash Equivalents	\$
Accounts Receivable	\$
Other Current Assets	\$
Fixed Assets	\$
Other Long-term Assets	\$
Liabilities	2023
Accounts Payable	\$
Credit Cards	\$
Other Current Liabilities	\$
Other Current Liabilities	

Growth & Risk Assessment

The following questions help us understand how your practices and operations impact your valuation and identify areas for growth and risk management.

How many customers does the business have?				
What percent of revenue is generated by the top 2 customers?				
0 - 20% 21 - 40% 41 - 60% 61 - 80% 81 - 100%				
William and a formation of the second of the				
What percent of your revenue is recurring, renewing, or one-time?				
% Recurring % Renewing % One-time				
What percent of revenue relies on any one vendor?				
%				
70				
Harry more halo and a company of the company of the street o				
How much do you expect your revenue to grow next year?				
%				
Who was into increased in a naid recorded (Calaat and)				
Who maintains your financial records? (Select one)				
I do Internal accounting / finance team Bookkeeper only CPA only Bookkeeper & CPA				
If you departed from the business today, how likely is it that revenue				
and/or profitability declines?				
Very Unlikely Neutral Likely Very Likely				
Think of key employees. If they departed from the business today, how				
likely is it that your revenue and/or profitability declines?				
Very Unlikely Neutral Likely Very Likely				
very offlikety Medital Likety Very Likety				
December of the second second in clouds and of the following in common and initial 2				
Does your risk management include any of the following insurance policies? (Select all that apply)				
General Liability Buy-sell Business Overhead Expense Key Person				
WI				
What percent of the company do you own?				
%				
70				

Goals for life after your business

The following questions help us understand how you see the business fitting into your life plans.

What does a cuscosful svit for	warm varim husin asa la ak lika? (Calact all	the engly)		
Sell (either internally or exter	·	The apply)		
Transition (to family, employees, etc.) Operate until I can retire, then close				
How much cash from selling t	the business are you relying on to fund	your retirement?		
I need at least this much from selling to fund my retirement:	\$			
l'm not relying on cash from	selling my business to fund my retirement			
l'm not sure				



Thank you

We appreciate the trust you place in us and will be in touch with business insights shortly.