

CLIENT INTAKE FORM: BUSINESS PURCHASE/SALE

CLIENT(S)		Client(s) is (are):	Seller(s)	Buyer(s)
<u>Client 1</u> Name: _____ Address: _____ SSN: ____ - ____ - ____ Phones: (H) +1 () _____ (Pg/Cell) +1 () _____ (W) +1 () _____ (Fax) +1 () _____ E-mail: _____ Existing Business: _____ Form of Ownership: _____ Established/Incorporated/Registered: _____ State _____ County _____ Date _____ File No. _____		<u>Client 2 (or Client's Agent)</u> Name: _____ Address: _____ SSN: ____ - ____ - ____ Phones: (H) +1 () _____ (Pg/Cell) +1 () _____ (W) +1 () _____ (Fax) +1 () _____ E-mail: _____ Existing Business: _____ Form of Ownership: _____ Established/Incorporated/Registered: _____ State _____ County _____ Date _____ File No. _____		
NB: If there are other Clients, please list on separate sheet of paper.				

SUBJECT BUSINESS	
Business Name	_____
Business Description	_____
Street Address	_____
City _____	County _____
Form of Ownership: _____	
Established/Incorporated/Registered:	State _____ County _____ Date _____
File No.	_____
Stand-alone business	Y/N
Franchise	Y/N IF YES, PROVIDE Copy of Franchise Agreement
SELLER OWNS REAL ESTATE ON WHICH BUSINESS IS LOCATED Y/N	
IF YES, PROVIDE:	PIN# _____ - _____ - _____ - _____ Vol. _____
IF NO, PROVIDE:	Copy of Lease

TERMS OF PURCHASE/SALE	
Price:	Business Only \$ _____
	Real Estate \$ _____
	Total \$ _____
Closing Date: _____ @ _____ .M.	

Business Portion

Contract: Y/N

Contract Acceptance Date: _____ Costs Paid by Seller: \$ _____

Terms: Down Payment \$ _____

Financed \$ _____

Cash Balance \$ _____

Finance Contingency Date: _____

Finance Commitment Date: _____

Inspection Contingency Date: _____

Closing Date: _____ Time: _____

Location: _____

Phone #: +1 () Fax#: +1 ()

Real Estate Portion

Contract: Y/N

Contract Acceptance Date: _____ Costs Paid by Seller: \$ _____

Terms: Down Payment \$ _____

Financed \$ _____

Cash Balance \$ _____

Finance Contingency Date: _____

Finance Commitment Date: _____

Inspection Contingency Date: _____

Closing Date: _____ Time: _____

Location: _____

Phone #: +1 () Fax#: +1 ()

NB: Provide copy of Contract(s) and any Riders**CONTACT INFORMATION****Attorneys**Purchaser

Name: _____

Address: _____

Phone#: _____

Fax #: _____

E-Mail: _____

Seller

Name: _____

Address: _____

Phone#: _____

Fax #: _____

E-Mail: _____

RealtorsPurchaser

Name: _____

Address: _____

Phone#: _____

Fax #: _____

E-Mail: _____

Seller

Name: _____

Address: _____

Phone#: _____

Fax #: _____

E-Mail: _____

Mortgage Broker/BankerPurchaser

Name: _____
Address: _____
Phone#: _____
Fax #: _____
E-Mail: _____

Seller

Name: _____
Address: _____
Phone#: _____
Fax #: _____
E-Mail: _____

Title Company

Name: _____
Phone #: + 1 () _____

Commitment #: _____
Fax #: + 1 () _____