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## Buyer's Questionnaire

Client's names: \_\_\_\_\_

Date: \_\_\_\_\_ Phone Number: \_\_\_\_\_

1. How much money do you have to purchase a business? (A financial statement will be required by a bank so this should be compiled ASAP)  
\_\_\_\_\_
2. Is this money liquid or will you need to raise it?  
\_\_\_\_\_
3. Do you have other sources of capital that you would be willing to use?  
\_\_\_\_\_
4. Do you have funds set aside for operating capital after you purchase a business?  
\_\_\_\_\_
5. What Rate of Return (ROI) are you looking for in the purchase of this business?  
\_\_\_\_\_
6. What kind of Discretionary Earnings level are you looking for? (Cash flow of the business you are purchasing to support yourself, pay your loan payments, and provide desired ROI)  
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7. Are you expecting any owner financing to be able to purchase a business?  
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8. What is your ideal sales price?

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9. How long have you been looking for a business to purchase?

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10. What kind of businesses are you interested in purchasing? (For example – Are you interested in a Service, Manufacturing or Distribution business?)

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11. How soon do you plan to purchase a business?

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12. What businesses have you already considered or made an offer on?

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13. What are your expectations in the buying process?

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14. Who are the decision makers in this process?

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15. What specific experience do you have? If possible, please provide resumes for each business owner who will be involved in operating the business.

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16. Have you explored financing options? Have you applied for pre-approval for an SBA or Conventional loan?

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17. Are you planning to continue to work in your current job after the purchase of a business?

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18. Who will run the business you plan to purchase?

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19. Do you have any geographic preferences within the Metroplex?

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## **My Client/Customer Commitment**

1. I am acting as an advisor in the acquisition process and will use my training and experience to the best of my ability to add value to any transaction.
2. I will return all calls and respond to all emails promptly.
3. I will deal with all parties with honesty, integrity, and respect.
4. I will make every effort to provide a “Win/Win” in each transaction.
5. I will provide full disclosure of information to my clients.