

INTAKE FORM: BUSINESS PURCHASE (NY)

RINCKER LAW, PLLC

I. CLIENT CONTACT INFORMATION

Name: _____

Business Name (including DBA's): _____

Established/Incorporated/Registered State: _____

Form of Business: _____

Stand-alone business or franchise: _____

EIN: _____

Type of Business: _____

Telephone Number: _____

Email Address: _____

Address: _____

II. NEW BUSINESS'S INFORMATION

Business Name (including DBA's): _____

Established/Incorporated/Registered State: _____

Form of Business: _____

Stand-alone business or franchise: _____

EIN: _____

Type of Business: _____

Seller's Name and Title: _____

Telephone Number: _____

Email Address: _____

Website of the Proposed Acquired Business: _____

Address: _____

III. BACKGROUND INFORMATION OF NEW BUSINESS

Have you seen the business's Articles of Incorporation, Bylaws, and/or minutes?

_____ Yes _____ No

Please explain: _____

Do you have a copy of the business's credit report? _____ Yes _____ No

Do you have any recent audited and unaudited financial statements? _____ Yes _____ No

Have you obtained a customer list? _____ Yes _____ No

IV. REAL ESTATE OF THE NEW BUSINESS

Do you have a copy of all the real estate leases, deeds, mortgages, title policies, surveys, zoning approvals, variances and/or use permits? _____ Yes _____ No

V. EMPLOYEES AT THE NEW BUSINESS

Do you have a list of the employees, including their position, current salaries and any bonuses, years of service? _____ Yes _____ No

Have you seen resumes of key employees? _____ Yes _____ No

Do you have a copy of the business's employee handbook? _____ Yes _____ No

If there are any benefits to the employees, have you seen copies of any retirement plans or health insurance plans? _____ Yes _____ No

VI. VALUE OF THE NEW BUSINESS

Has the business been valued? _____ Yes _____ No

Do you have any business appraisals? _____ Yes _____ No

Do you have a schedule of the business's assets? _____ Yes _____ No

Do you have a schedule of inventory? _____ Yes _____ No

Do you have a schedule of the business's liabilities? _____ Yes _____ No

What are the fixed and variable expenses?

Are there any outstanding debts the business owes? (Please explain, if known.)

Are there any outstanding payments due to the business? (Please explain and state when they are due, if know.)

Are there any leases of equipment? (If so, please list them, if you know)

_____ Yes _____ No

Is there any pending litigation regarding the business that you are aware of?

_____ Yes _____ No

(Please explain) _____

Have you received copies of the business's general liability, personal and real property, worker's compensation and other insurance? _____ Yes _____ No

What is your favorite drink? _____

*** If there are any other documents or reports you have received from the new business, please provide it to us.**