

Company Name:
Website : www.

Company No:
Private E-mail:

Shareholders / Directors / Partners names	Shares %	Active Y/N	Job role	Wants to stay Y/N	Replacement cost / Salary

Date established		Business activity	
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Reason for business valuation	Do you have idea of value?	By what date
Just interested in finding the value		
Starting point for business development		
Probate / Divorce / marriage		
Potential business sale: Retirement – Ill health – change of lifestyle		
To help raise finance		
Other reason – Please state		

What product or service do you provide:

Brief business description:

Market place:

Geographic location you operate in:

Do You Factor: Y N If so who with:

Your Clients	Block or Spot Contracts	Hours per week	Ave Hourly Charge Rate	Ave Hourly Pay Rate
Social Services				
Private Clients	N/A			
Renewal/Review				

Your 3 main competitors	Larger / smaller than you	Location

Confidential - Fact find for postal valuation

You can rest assured we will not pass any of your details onto a third party.

Key staff (Just initials)	Position & Job Role	Length of service	Salary

Other employed staff	Full time	Part time	Contract staff	Full time	Part time	Mark up
Managers			Managers			
Senior staff			Senior staff			
Administration			Administration			
Supervisory			Supervisory			
Operational			Operational			

Property detail type	Freehold / leasehold	Value / rent	Owned by	Size Sq Ft

If this valuation is for a business sale:	As much detail as possible please
What is your preferred exit time or date	
Are you looking for a position within the business after sale If so what position (Full time / Part time)	
Do you have a minimum value in mind	
How long are you prepared to give as a handover	
Have you considered an earn-out or partial sale	
Is there any member of current staff that could be trained as a manager / managing director	

If this valuation is for an other reason would you like further information on	Please call to discuss	Please provide further information
Help with a business development program		
Business or personal coaching		
Making your business more profitable		
Training and motivating staff		
Raising finance for cash flow / business expansion		
Help with management information (monthly management accounts – cash flow forecasts)		
Effective marketing		

To ensure we provide the most accurate valuation for your purpose please ensure you provide us with as much of the following as possible	Enclosed	To follow
This completed fact find form		
3 years accounts		
Last 4 VAT returns or latest management accounts		
Cash flow forecasts or business development plans		
Organogram		
As much information on your company as possible (brochures, marketing material) anything that set you apart from your competitors		

- Please use additional sheets if space provided is not large enough.