

## GET YOUR BUSINESS READY TO SELL!

### DO YOU HAVE YOUR...

#### Financial Records:

Collect these for current and past three years:



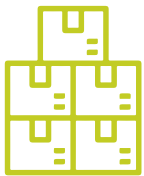
- Profit and loss statements
- Current balance sheet
- Business tax returns
- Cash flow statement

#### Additional Financial Assets:



- Statement of seller's discretionary earnings for most recently completed year
- Accounts receivable aging list
- Accounts payable list
- Asset depreciation schedule from your most recent tax return

#### Company Operations:



- Financial ratios and trends
- Inventory list with associated values
- Fixtures, furnishings, and equipment list with associated market value
- Photos of business building, work areas, and equipment
- Your business licenses, certifications, and registrations
- Product or service price list
- Employee records showing staff, hire dates, salaries, pensions, and any employee benefit plans
- Current client list
- Up-to-date list of major suppliers and distributors

#### Leases and Agreements:



- Current building lease
- Franchise agreement, if applicable
- Up-to date copies of equipment and facility maintenance agreements
- Current employee, customer, vendor, and distributor contracts or agreements
- Copies of outstanding loan agreements
- List of existing liens

### **Business Structure:**



- Copies of patents and trademark registrations
- Organization chart
- Business formation documents
- Operations Manual - including business plan, marketing plan, business policies and procedures

### **HAVE YOU TALKED TO YOUR...**



- Accountant
- Lawyer
- Broker
- Appraiser

### **HAVE YOU ORGANIZED YOUR...**



- Tangible assets - physical items that add value to your company. Ie. Furniture, machinery, inventory or real estate
- Intangible assets - the systems and ideas that make your business unique. Ie. your trademark, your procedures, reputation, client list or trade secrets

### **HAVE YOU TAKEN CARE OF YOUR HEART?**

*Did you...*



- Set boundaries around what work you will do and how long you will stay after the new owner takes over
- Find an impartial third party that will stand up for your interests
- Tuck your ego away and open your heart to new possibilities

**Systems Business Coach®** is here to help. When you want to, you can book a free coaching session with us.

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