

## Business Valuation Client Questionnaire

1. Name of the business/company: \_\_\_\_\_

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2. Australian Business Number or Australian Company Number of the business/company:

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3. Contact details of the main contact for this business valuation. Please include name, position, phone number, email address and postal address:

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4. Director's name: \_\_\_\_\_

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5. Reason for business valuation: \_\_\_\_\_

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6. The name of the legal entity that owns the business: \_\_\_\_\_

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## Business Valuation Client Questionnaire

7. List any related entities and subsidiary companies: \_\_\_\_\_

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8. Describe in detail the nature of the business and business activities:

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9. When was the company founded and who founded it? \_\_\_\_\_

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10. When was the company incorporated? \_\_\_\_\_

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11. Identify and describe the company's products and services: \_\_\_\_\_

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12. Describe the customer base of the business/company: \_\_\_\_\_

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## Business Valuation Client Questionnaire

13. Write a brief history of the business/company: \_\_\_\_\_

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14. What industry does the business operate in? \_\_\_\_\_

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15. List the company's major competitors: \_\_\_\_\_

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16. Discuss to what extent the company is vulnerable to its competitors: \_\_\_\_\_

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17. Discuss what the company's competitive advantages and disadvantages are:

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## Business Valuation Client Questionnaire

18. Discuss what the barriers to entry exist for a new competitor to begin: \_\_\_\_\_

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19. Total number of employees: \_\_\_\_\_

20. Provide a breakdown of the current staffing level: \_\_\_\_\_

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21. Does the company own any intellectual property (i.e. trademarks, brands and symbols):

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22. What level of future cash flow forecasting and long term budgeting is undertaken by the business/company?

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## Business Valuation Client Questionnaire

23. Provide a discussion of any potential or actual lawsuits brought by or against the company during the past five years, and include: nature of the lawsuit, amount involved, and status or outcome of the lawsuit (if applicable, indicate whether or not insurance covered any claims):

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24. Is the company current with all of its federal & state tax liabilities? If not, discuss what liabilities are not current:

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25. Discuss any issues that were not specifically addressed in this questionnaire that you feel we should be made aware of in rendering our valuation report:

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26. List the names of all individuals who responded to this questionnaire, or provided information in response to this questionnaire:

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27. Contact details of the company accountant: \_\_\_\_\_

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