

Business Valuation Client Questionnaire

1. Name of the business/company: _____

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

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

4. Director's name: _____

5. Reason for business valuation: _____

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

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7. List any related entities and subsidiary companies: _____

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

9. When was the company founded and who founded it? _____

10. When was the company incorporated? _____

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

12. Describe the customer base of the business/company: _____

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

14. What industry does the business operate in? _____

15. List the company's major competitors: _____

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

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

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

19. Total number of employees: _____

20. Provide a breakdown of the current staffing level: _____

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

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

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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):

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

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:

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

27. Contact details of the company accountant: _____
