

**DISCLAIMER**

The following form is provided by FindLaw, a Thomson Business, for informational purposes only and is intended to be used as a guide prior to consultation with an attorney familiar with your specific legal situation. FindLaw is not engaged in rendering legal or other professional advice, and this form is not a substitute for the advice of an attorney. If you require legal advice, you should seek the services of an attorney by linking to [FindLaw.com](http://FindLaw.com). © 2005 FindLaw.com. All rights reserved.

**SELLING A BUSINESS  
INTAKE QUESTIONNAIRE**

Being thoroughly prepared before meeting with your attorney in all instances will save you time and money. If you are selling your business, the following is a list of questions you should answer prior to meeting with your attorney. This list is not meant to be exhaustive; you should always provide your attorney with any additional information you think is relevant.

Legal Name of Company: \_\_\_\_\_

Location of Company Headquarters: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Mailing Address (if different): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Addresses for Other Locations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Date Started Business: \_\_\_\_\_

Legal Status of Your Company (*corporation, partnership, sole proprietor, other*): \_\_\_\_\_

Number of Partners: \_\_\_\_\_  
(if partnership)

Number of shareholders: \_\_\_\_\_  
(if corporation)

Number of members: \_\_\_\_\_  
(if limited liability)

Trade or Assumed Name: \_\_\_\_\_

Federal Tax Identification Number: \_\_\_\_\_

State Tax Identification Number: \_\_\_\_\_

If your Company is a corporation, list:

Number of shares of preferred stock: \_\_\_\_\_

Number of shares of common stock: \_\_\_\_\_

Is your Company publicly held? \_\_\_\_\_

If publicly held, what is your  
SEC File number? \_\_\_\_\_

Name, address, account number of financial  
institution(s) where your company  
maintains accounts:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List the amount of insurance on any  
real property owned by your company: \_\_\_\_\_

Name of applicable agent: \_\_\_\_\_

List the amount of insurance on any  
personal property owned by your company: \_\_\_\_\_

Name of applicable agent: \_\_\_\_\_

Give a brief description of your Company's  
business:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name, address, state, zip, phone number  
for Company accountant:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_