

Example Acquisition Data Sheet

Company Name & Website	
Main Contact Person	
Company Address	
Location of Branch Offices	
Work Phone	
Cell Phone	
E-mail	
Fax	

Niche Summary	
Company Revenues	
Company Profit Margin	
Company Type	
Ownership type	
Number of Employees	

1. About the company (Explain how target company started and evolved to its present position. Limit comments to significant facts e.g. ownership changes, important acquisitions, new divisions, divestitures):

2. Company Ownership Breakdown:

Name	Title, Age & Ownership %

3. Does any party, other than the company, have any ownership? If yes explain:

4. Current Revenue Breakdown (needs to be specific based on the industry):

Total Revenues	\$
Type of Revenue	%

5. How many employees in each area? What is the current compensation package for your employees (average base, bonus, and total)?

Employee Type	Number of Employees	Average Total Compensation
Title 1		
Title 2		
Title 3		
Title 4		
Title 5		
Other		
Total Employees		

6. Where do you see yourself in 5 years from now?

7. What is your current perpetuation plan?

8. What is your favorite part of the business? If you could design your perfect role/position/day, what would it look like?

9. What keeps you from doing that now?

10. What are your growth plans?

11. How do you expect to reach those goals? Have you ever considered purchasing other businesses? What areas do you want to continue to develop (new and existing)?

12. What areas of your current business are you most concerned about?

13. What are the top 3 most important things you would have to consider if this were to move forward?

14. What about this specific situation is intriguing to you? What are your hesitations?

15. Have you looked at something like this before? If so, why did you decide against it?

16. What will this situation have to include to be able to happen?

17. What are your financial expectations as far as this deal is concerned?

18. Are you involved in any current or pending law suits?

