



Business Owner Profile

Owner Information	
Name:	
Company:	
Address:	
If other owner(s):	

Company Information	
Business Description:	
Web Address:	
Business Structure:	C-Corp S-Corp LLC Partnership
Annual Gross Sales:	
Net Income:	
Number of Employees:	
Estimated Value:	How Determined? (guess, etc.)



Exit Planning Concerns

Develop Exit Strategy

- Sell 100% to outsiders?
 Sell less than 100% (equity re-cap)
- Merger
- Acquisition of another company
- Employee Stock Option Plan (ESOP)

Need for business valuation

Need more capital to grow/expand

Buy-out majority shareholder

Planned Departure Date:

Other Concerns:

Advisor Name:	
Location:	
Phone Number:	
Email:	

Please forward, if available:

- Company Financial Statements (Balance Sheets, P&L Statements)
- Business Plan or Offering Memorandum

Instructions

Please **EMAIL**, **MAIL** or **FAX** this Business Owner Profile to:

Dan Prisciotta, Managing Partner, Equity Strategies Group

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FAX: 201-368-5161

For any questions, please call: 866-807-0325

This information will be kept confidential in accordance with the attached privacy policy.