

Business Valuation Checklist

Gathering and preparing data is a crucial step in completing a proper and accurate valuation. Additional requested information will be tailored to the purposes and needs of your valuation – whether it's for the sale of the business, tax purposes, divorce, or other reasons.

The following list contains essential information to have on hand for your valuation, to ensure an accurate estimate of the business value:

- 1. Federal Tax Returns for the last three fiscal years**
Forms 1065, 1120, 1120S or Schedule C
- 2. Balance sheets for the last three fiscal years**
- 3. Completed Mini Fact Finder**
- 4. Most recent interim and fiscal year-to-date financial statements**
Detailed balance sheet and income statements
- 5. List of One-Time Non-Recurring, Non-Operating Revenues, Expenses, Gains and/or Losses**
If applicable
- 6. Schedule of Compensation Paid to each owner and family member for each year**
W-2 and 1099 amounts

Let us help you on your financial journey.