

# Limited Offer for Business Owners and Entrepreneurs Statewide

No-Cost Credentialed Business Valuation for Financing or Business Purchase,  
or for Credentialed Business Exit or Transition Planning Packages

P R O G R A M   A P P L I C A T I O N

**A. YOU ARE A:**

BUSINESS OWNER      BUSINESS BUYER      BANK OR LENDER

ECONOMIC DEVELOPMENT STAFF      CITY-CHAMBER STAFF

OTHER \_\_\_\_\_

**B. YOUR CONTACT INFORMATION**

ORGANIZATION: \_\_\_\_\_

EMAIL: \_\_\_\_\_

OFFICE PHONE: \_\_\_\_\_

CELL PHONE: \_\_\_\_\_

**C. TYPE OF PROJECT REQUESTED**

VALUATION FOR PURCHASE-SALE BANK OR SBA FINANCING

Proposed Sale Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

VALUATION FOR OTHER PURPOSE

Explain Please:

BUSINESS EXIT-TRANSITION PLANNING ENGAGEMENT

**D. BUSINESS INFORMATION**

CORPORATE NAME: \_\_\_\_\_

BUSINESS OR BRAND NAME: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

CITY, ZIP CODE: \_\_\_\_\_

WEBSITE: \_\_\_\_\_

PRIMARY, SECONDARY INDUSTRY: \_\_\_\_\_

FOUNDED: \_\_\_\_\_ NO. FULL-TIME EMPLOYEES: \_\_\_\_\_ NO. PART-TIME EMPLOYEES: \_\_\_\_\_

ORGANIZATIONAL STRUCTURE: C S LLC LLP PARTNERSHIP PC OTHER \_\_\_\_\_

OWN LAND-BUILDING INSIDE COMPANY - OR - LEASE FROM A THIRD PARTY

OWN LAND-BUILDING INSIDE ANOTHER COMPANY AND LEASE IT TO COMPANY

DESCRIPTION OF BUSINESS PRODUCTS-SERVICES:

SUMMARY OF BUSINESS'S HISTORY TO PRESENT:

**E. MUST INCLUDE WITH APPLICATION FOR CONSIDERATION**

2015 ANNUAL INCOME-EXPENSE -OR- PROFIT AND LOSS REPORT (12-MONTH, FULL YEAR REPORT)

2015 ENDING BALANCE SHEET (LAST DAY OF THE ABOVE REPORT)

2016 ANNUAL INCOME-EXPENSE -OR- PROFIT AND LOSS REPORT (12-MONTH, FULL YEAR REPORT)

2016 ENDING BALANCE SHEET (LAST DAY OF THE ABOVE REPORT)

**F. IMPORTANT NOTICE AND DISCLAIMERS**

1. Information provided to NBDC is confidential, and is used for application screening, and to complete the requested engagement if accepted, and for grant and impact reporting purposes only.

I Agree

2. Business owners and/or applicants must agree to work cooperatively with NBDC, and provide requested information required to complete the requested engagements that includes up to 3 years of financial information, use of cash flows, information on business and non-operating assets, ownership information, and other business operations or data.

I Agree

3. Business owners and/or applicants must agree to participate in follow-on interviews regarding the NBDC program services, and project results or outcomes, required to complete project reporting.

I Agree

4. Business owners and/or applicants must agree to allow NBDC to create possible success stories as a result of the requested engagement that uses only appropriate information regarding the business, project and NBDC's assistance once the engagement is complete. NBDC will coordinate with the owner or applicant regarding what is appropriate for such stories.

I Agree

5. X \_\_\_\_\_ (signature) \_\_\_\_\_ (date)