

**BUSINESS VALUE CALCULATION**  
**Data Collection Sheet**

**BUSINESS VALUE CALCULATION DATA**

Name of individual completing this data worksheet:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_ Designation: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address 1: \_\_\_\_\_ Address 2: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Website: \_\_\_\_\_

Would you like your company logo on the title page?  Yes  No

- If "Yes", attach a "jpg" logo file to an Email and send to:  
[customerservice@thevalueforecaster.com](mailto:customerservice@thevalueforecaster.com) with contact information.

Data entered is date ending (xx/xx/xx): \_\_\_\_\_  
Calendar year?  Yes  No Fiscal year?  Yes  No

Address the report to an individual other than the owner?  Yes  No

- If "No", leave this section blank.

Other Individual:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Title: \_\_\_\_\_ Salutation: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address 1: \_\_\_\_\_ Address 2: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Did you use tax forms for the data in your entries?  Yes  No

Did you use company financial statements?  Yes  No

Business Name: \_\_\_\_\_  
Address 1: \_\_\_\_\_ Address 2: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Website: \_\_\_\_\_

SIC/NAICS Code: \_\_\_\_\_  
SIC/NAICS Description: \_\_\_\_\_

- The SIC/NAICS code should listed on your tax form.

Business Owner:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Title: \_\_\_\_\_ Salutation: \_\_\_\_\_  
Address 1: \_\_\_\_\_ Address 2: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Email: \_\_\_\_\_

Type of Business Entity:

Sole Proprietor  Partnership  LLP  LLC  C Corp  S Corp

In Business Since: \_\_\_\_\_

Type of Financial Statements Used for Data:

Audited  Reviewed  In-house  Tax forms

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**Market Variables**

Is there any deferred maintenance needed in the business?  Yes     No  
If "Yes", what is estimated amount to bring up to standard \$ \_\_\_\_\_

Estimated Fair Market Value of Assets:

\$

Auto/Trucks: \_\_\_\_\_

Inventory: \_\_\_\_\_

Machinery/Equipment: \_\_\_\_\_

Office Furniture/Fixtures: \_\_\_\_\_

Real Estate: \_\_\_\_\_

- Enter only if real estate is listed as an asset of the company.

Total \_\_\_\_\_

Current interest rates and terms available from your preferred lender for an asset secured loan in these categories:

%

Yrs

Auto/Trucks: \_\_\_\_\_

Inventory: \_\_\_\_\_

Machinery/Equipment: \_\_\_\_\_

Office Furniture/Fixtures: \_\_\_\_\_

Blended Loans (Using All Assets): \_\_\_\_\_

Real Estate: \_\_\_\_\_

Total \_\_\_\_\_

**Income Statement Data**

**Income Statement and Balance Sheet Data**

**Attach to this questionnaire for the year prior to the year to be planned:**

1. The in-house income statement and balance sheet.
2. The company's tax form and attached expense schedules.
  - a. If sole-proprietor, don't include the personal tax form.

Only attach the schedule "C" and related documentation.