

Personal Information
& Financial Statement

PERSONAL INFORMATION

Full Name

Date

Address

Residence Telephone

Alternate

Fax

Email Address

Date of Birth(Month/Day/Year)

U.S Citizen? If No, What Country?

Marital Status

Spouse's Full Name

Spouse's Date of Birth (Month/Day/Year)

U.S. Citizen? If No, What Country?

GENERAL INFORMATION

Do you plan to operate this business yourself? If not, who will?

Do you intend to have a partner? If so, who?

Targeted Industries Restaurant Retail Wholesale Services Real Estate Other

Do you prefer franchise or independent?

When do you want to begin operations?

Will you personally work in the business

Pacific Coast Business Brokers

8105 Irvine Center Drive, Suite 900, Irvine, CA 92618

Office: 949.546.0903 Fax: 949.266.9435

BUSINESS HISTORY

Most Recent Company Name & Address

Telephone Number

Dates of Employment

Job Title

Businesses Owned

Principles: Please list other officers, investors, partners who may participate with you in the acquisition.

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FINANCIAL INFORMATION

Do you Own or Rent your Home? \$
Monthly Mortgage/Rent Amount

Years Lived at Present Address Years Lived in Present City

Approximate Net Worth

Minimum Income Required per month?

Approximate Fico Score

Cash Lender Financing Owner Financing Stock Exchange Other
Purchase Terms

Checking Savings Retirement Other =
Types of Accounts (Mark all that Apply)

Have you ever declared bankruptcy? If so, when and where?

\$
Amount of Cash you Intend to Invest in Business Method of Financing

Do you have a financing source? Who?

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Assets

Liabilities

| | | | |
|---|-----------|---------------------------------|-----------|
| Cash on Hand & In Banks | \$ | Notes Payable to Bank | \$ |
| U.S. Government Securities | \$ | Unpaid Income Tax | \$ |
| Listed Securities & Current Market Value | \$ | Real Estate Mortgages Payable | \$ |
| Unlisted Securities | \$ | Chattel Mortgages & Other Liens | \$ |
| Owned Automobiles & Personal Property | \$ | Other Debts Itemized | \$ |
| Cash Value of Life Insurance | \$ | Notes Payable | \$ |
| Retirement Plans & IRA's | \$ | Total Credit Card Debt | \$ |
| Real Estate Owned | \$ | Other Liabilities | \$ |
| Other Assets | \$ | | |
| | | | |
| Total Assets | \$ | Total Liabilities | \$ |
| (Total Assets – Total Liabilities = Net Worth) | | Net Worth | \$ |

Income – Self

Income - Spouse

| | | | |
|-----------------------|-----------|-----------------------|-----------|
| Current Annual Salary | \$ | Current Annual Salary | \$ |
| Bonus Income | \$ | Bonus Income | \$ |
| Other Income | \$ | Other Income | \$ |
| | | | |
| Total Income | \$ | Total Income | \$ |

This application authorizes Pacific Coast Business Brokers to contact persons or businesses in regard to the information herein.

Signature

Date

Print Name

Pacific Coast Business Brokers

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