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## Confidential Buyer Registration

Thank you for inquiring about the Utah businesses we represent for sale. In order to provide you with the benefits of all our services, please complete the “Confidential Customer Profile” and sign the “Confidentiality Agreement” after reading it entirely. This information will enable us to better help you choose the businesses that are complementary to your skills, interests, financial needs and capabilities.

Return the completed “Confidential Customer Profile” and the signed copy of the “Confidentiality Agreement” to our office by Fax, Mail, Email, or Call for Appointment. If you have any questions about any of our services, please call to speak with a licensed professional Business Broker. We are looking forward to working with you.

### Steps to purchasing a business through Business Resource Center OAB

1. **CONTACT BROKER AND REGISTER:** This is the most important step to help us determine your Interests, Financial Needs and Capabilities. During this step, we will ask you to sign a non-disclosure statement. The business owners who have listed their business with us require this non-disclosure to ensure you are aware of the importance of safeguarding the information you will receive.
2. **SELECT BUSINESSES TO REVIEW:** We will show you the best opportunities based on your registration interview. You may not qualify for some businesses due to experience or financial ability, so there is no need to spend time on those businesses.
3. **TOUR SELECTED BUSINESSES:** We will make arrangements for you to meet the owner and see the business. Many times these tours are done before or after business hours so we don't disrupt the business and accidentally alert the employees or customers the business is for sale.
4. **MAKE PROPOSAL WITH EARNEST MONEY:** The amount of earnest money that accompanies the offer to purchase is up to you. A typical amount would be 1% of the purchase price offered, with a minimum of \$1,000. Your earnest money shows the seller how serious you are about the offer and is protected by any contingencies you write into the offer. All offers require you to provide a personal financial statement. This information shows your capability to purchase the business and will help the seller decide on accepting your offer.
5. **DUE DILIGENCE:** Once your offer is accepted, you then have the opportunity to inspect Business Records, Equipment, etc... to satisfy the contingencies that are a part of the accepted offer.
6. **REQUEST ESCROW DOCUMENTS FROM ATTORNEY:** After all contingencies are satisfied we will have you sign an Authorization to Close which gives us permission to have closing documents drafted by the closing attorney. Their fees are paid when signing this document. Currently, the fees range from \$700 - \$900 and are shared equally between Buyer and Seller (\$350 - \$450 each).
7. **INVENTORY VERIFICATION:** If you are buying a business that maintains inventory, we will usually count it the day before you take possession of the business. If the cost value is more or less then what was stated in the accepted offer, then the purchase price is adjusted by the difference.
8. **CLOSING:** We will all meet at the attorney's office to review the closing documents and make any corrections. Clean copies are made and signed. **CONGRATULATIONS!**



**Business Resource Center OAB**  
*Linking Buyers and Sellers*

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## Confidential Customer Profile

Name \_\_\_\_\_

Spouse or Partner Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone: Home# \_\_\_\_\_ Work# \_\_\_\_\_ Mobile# \_\_\_\_\_

Fax# \_\_\_\_\_ Email \_\_\_\_\_

Place of Employment \_\_\_\_\_

How did you hear about Business Resource Center? \_\_\_\_\_

Have you ever worked with a business broker before?    Yes    No

Are you familiar with our services?    Yes    No

Do you: Own Your Home    -or-    Rent

Any special training or schooling that could be used in business operation? \_\_\_\_\_

Do you have any hobbies that may tie in with a business career? \_\_\_\_\_

What do you like most about what you do now and why? \_\_\_\_\_

What do you like least about what you do now and why? \_\_\_\_\_

What other types of work have you done? \_\_\_\_\_

Previous job: \_\_\_\_\_ Reason for leaving: \_\_\_\_\_

What are your applicable strong points? \_\_\_\_\_

**LOCATION AND TYPE OF BUSINESS:**

Where would you prefer the business be located? \_\_\_\_\_

Most Desirable type of business \_\_\_\_\_

Least Desirable type of business \_\_\_\_\_

**TO DETERMINE WHAT SIZE BUSINESS WORKS FOR YOU, PLEASE PROVIDE THE FOLLOWING INFORMATION:**

Your current annual income \$ \_\_\_\_\_ Spouse/Partner current annual income \$ \_\_\_\_\_

Other income \$ \_\_\_\_\_ **Total Current Annual Income \$ \_\_\_\_\_**

What is the minimum level of spendable income you expect from your business in the first year? \$ \_\_\_\_\_

What level of spendable income do you desire from your business annually? \$ \_\_\_\_\_

For the right opportunity, how much can you personally invest comfortably as the initial investment? \$ \_\_\_\_\_

**Where will your initial investment come from?**

Cash on Hand    \$ \_\_\_\_\_

Real Estate Equity    \$ \_\_\_\_\_

Stocks & Bonds    \$ \_\_\_\_\_

Other Collateral    \$ \_\_\_\_\_

**Total funds available \$ \_\_\_\_\_**

