

## BUSINESS NOTE WORKSHEET

Broker's Name \_\_\_\_\_

Seller's Name: \_\_\_\_\_ How did Note Seller hear of you? \_\_\_\_\_

Date: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

### **BUSINESS INFORMATION:**

Type of Business: \_\_\_\_\_

Asset Value Breakdown: Equipment \$ \_\_\_\_\_ Inventory \$ \_\_\_\_\_ Goodwill \$ \_\_\_\_\_

Is operation a Franchise? Yes/No \_\_\_\_\_ If yes, has Franchisor committed to cooperate with Note Buyer in event of foreclosure/resale? Yes/No \_\_\_\_\_

Street Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ County \_\_\_\_\_

How long in business at this location? \_\_\_\_\_

Business Location is: \_\_\_\_\_ Owned by Payor \_\_\_\_\_ Leased by Payor expires \_\_\_\_\_

Give terms of any lease renewal option(s): \_\_\_\_\_

Qualifications of Payor to operate this business: \_\_\_\_\_

If Payor is a corporation, is there also a creditworthy individual liable for payments? Yes/No \_\_\_\_\_

Name and Address: \_\_\_\_\_ SSN: \_\_\_\_\_

### **HISTORICAL INFORMATION:**

Date of Sale: \_\_\_\_\_

Selling Price: \_\_\_\_\_

Down Payment: \_\_\_\_\_

1st Lien: \_\_\_\_\_

2nd Lien: \_\_\_\_\_

### **DESCRIPTION OF BUSINESS LOCATION & AREA:**

### **PAYOR/PAYMENT INFORMATION:**

(Employment Information, Payment Record, Payor SSN)

### **NOTE INFORMATION:**

Date of Note: \_\_\_\_\_

Amount: \_\_\_\_\_

Term in Months: \_\_\_\_\_

Payment Amt: \_\_\_\_\_

Balloon Amt: \_\_\_\_\_

Balloon Date: \_\_\_\_\_

Interest Rate: \_\_\_\_\_

Due Date 1st Pmt: \_\_\_\_\_

# of Pmts Paid: \_\_\_\_\_

# of Pmts Left: \_\_\_\_\_

Next Pmt Due: \_\_\_\_\_

Balance: \_\_\_\_\_

### **MOTIVATION INFORMATION:**

(Why, How Much, When, etc.)

### **PERTINENT DOCUMENTS:**

I do have the copies of the following:

Note	Yes	No
Security Instrument	Yes	No
Title	Yes	No
Sales Contract	Yes	No
Payor Credit Report	Yes	No
Closing Statement	Yes	No
Bill of Sale	Yes	No
Insurance	Yes	No
Lease	Yes	No
Franchise Agreement	Yes	No
UCC-1	Yes	No
Payment History	Yes	No

### **DEAL STRUCTURE QUOTED TO SELLER:**

Buy Total Note: \_\_\_\_\_

Buy \_\_\_\_\_ Pmts for: \_\_\_\_\_

Buy \_\_\_\_\_ Pmts for: \_\_\_\_\_

Date Quote Given: \_\_\_\_\_

Closing Costs Pd By: \_\_\_\_\_