

Business Valuation Survey

Congratulations on taking the next step to sell or grow your business. This survey is the quickest way to get an accurate idea of a fair market value of your business from a true industry professional. Just complete the fillable fields below, save the PDF (no need to print!) and **once completed please email this survey to RentonInfo@TWorld.com**

Once submitted one of our partners at Transworld Business Advisors Renton will review your entries and email you with the results of our valuation work. Transworld is a 40 year old business brokerage, with a CBI overseeing the valuations. They are professionals with decades of experience you can trust to value or sell your business.

This valuation typically costs \$1000 to \$10,000 depending on the business size, however we are able to offer this service to you FREE of charge, due to our relationship with our amazing partners.

Root Energy Advisors is a Non profit company committed to Our Mission which is to create sustainable communities by empowering our local citizens through entrepreneurship, financial literacy, and encouraging improved health/wellness for balance in life.

Please be sure to leave us your contact info so we can get back in touch with your results!

First Name: _____

Last Name: _____

Email Address: _____

Phone Number: _____

Business Location (city/state): _____

We look forward to helping you assess the fair market value of your business, and the best next steps for you in the selling or growth process!



Business Valuation Survey

*Represents required information to complete the valuation

1. *What Industry are you in? _____
2. Business Name? (not required) _____
3. *What city is the business located in? _____
4. *How many Full Time Employees? _____
5. *How many Part Time Employees? _____
6. *How many hired Managers other than the owner(s)? _____
7. *How many hours a week does the owner work? _____
8. *What were totals sales in:
 1. 2018: \$ _____
 2. 2017: \$ _____
 3. 2016: \$ _____
9. *How much is written off in Depreciation Annually (tax returns are the best source for this)
 1. 2018: \$ _____
 2. 2017: \$ _____
 3. 2016: \$ _____
10. *How much interest does the business pay Annually?
 1. 2018: \$ _____
 2. 2017: \$ _____
 3. 2016: \$ _____
11. *Do you pay yourself a salary, how much by year?
 1. 2018: \$ _____
 2. 2017: \$ _____
 3. 2016: \$ _____
12. *What is the net income of the business by year?
 1. 2018: \$ _____
 2. 2017: \$ _____
 3. 2016: \$ _____
13. Years in Business? _____
14. Wholesale value of inventory? \$ _____
15. Anything else you would like us to know when we are doing your valuation?

Business Valuation Survey - How To Guide

This guide to aid with the completion of our business survey. See image below and correlated numbers to the questions above!

Form 1120		U.S. Corporation Income Tax Return		OMB No. 1545-0123
Department of the Treasury Internal Revenue Service		For calendar year 2018 or tax year beginning _____, 2018, ending _____, 2018		2018
▶ Go to www.irs.gov/Form1120 for instructions and the latest information.				
A Check it:		Name		B Employer identification number
1a Consolidated return (attach Form 851) <input type="checkbox"/>		TYPE OR PRINT Number, street, and room or suite no. If a P.O. box, see instructions.		C Date incorporated
b Life/nonlife consolidated return <input type="checkbox"/>				D Total assets (see instructions)
2 Personal holding co. (attach Sch. PH) <input type="checkbox"/>				\$
3 Personal service corp. (see instructions) <input type="checkbox"/>		City or town, state or province, country, and ZIP or foreign postal code		E Check it: (1) <input type="checkbox"/> Initial return (2) <input type="checkbox"/> Final return (3) <input type="checkbox"/> Name change (4) <input type="checkbox"/> Address change
4 Schedule M-3 attached <input type="checkbox"/>				
Income	1a Gross receipts or sales	1a		Q #8
	b Returns and allowances	1b		
	c Balance. Subtract line 1b from line 1a		1c	
	2 Cost of goods sold (attach Form 1125-A)		2	
	3 Gross profit. Subtract line 2 from line 1c		3	
	4 Dividends and inclusions (Schedule C, line 23, column (a))		4	
	5 Interest		5	
	6 Gross rents		6	
	7 Gross royalties		7	
	8 Capital gain net income (attach Schedule D (Form 1120))		8	
	9 Net gain or (loss) from Form 4797, Part II, line 17 (attach Form 4797)		9	
10 Other income (see instructions—attach statement)		10		
11 Total income. Add lines 3 through 10		11		
Deductions (See instructions for limitations on deductions.)	12 Compensation of officers (see instructions—attach Form 1125-E)		12	Q #11
	13 Salaries and wages (less employment credits)		13	
	14 Repairs and maintenance		14	
	15 Bad debts		15	
	16 Rents		16	
	17 Taxes and licenses		17	
	18 Interest (see instructions)		18	Q #10
	19 Charitable contributions		19	
	20 Depreciation from Form 4562 not claimed on Form 1125-A or elsewhere on return (attach Form 4562)		20	Q #9
	21 Depletion		21	
	22 Advertising		22	
23 Pension, profit-sharing, etc., plans		23		
24 Employee benefit programs		24		
25 Reserved for future use		25		
26 Other deductions (attach statement)		26		
27 Total deductions. Add lines 12 through 26		27		
28 Taxable income before net operating loss deduction and special deductions. Subtract line 27 from line 11.		28		
29a Net operating loss deduction (see instructions)	29a			
b Special deductions (Schedule C, line 24, column (c))	29b			
c Add lines 29a and 29b		29c		
30 Taxable income. Subtract line 29c from line 28. See instructions		30	Q #12	
31 Total tax (Schedule J, Part I, line 11)		31		
32 2018 net 965 tax liability paid (Schedule J, Part II, line 12)		32		
33 Total payments, credits, and section 965 net tax liability (Schedule J, Part III, line 23)		33		
34 Estimated tax penalty. See instructions. Check if Form 2220 is attached <input type="checkbox"/>		34		
35 Amount owed. If line 33 is smaller than the total of lines 31, 32, and 34, enter amount owed		35		
36 Overpayment. If line 33 is larger than the total of lines 31, 32, and 34, enter amount overpaid		36		
37 Enter amount from line 36 you want: Credited to 2019 estimated tax ▶ Refunded ▶		37		
Sign Here				
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				
Signature of officer		Date	Title	
Signature				
Paid Preparer Use Only				
Print/Type preparer's name		Preparer's signature		PTIN
Firm's name ▶		Firm's EIN ▶		Check <input type="checkbox"/> if self-employed
Firm's address ▶		Phone no.		