



Preliminary Information Request List

1. A description of the business's organizational structure and related organizations – eg. service trust, family trust, partnership arrangements.

2. Financial statements for three years.

3. The most recent management accounts, if available.

4. Monthly sales data for the previous financial year and the current financial year.

5. Any projections, capital budgets and strategic plans.

6. A schedule of fixed assets and the locations thereof.

7. Names and contracts of key employees.