

Business Valuation Checklist

To start your business valuation, we need the following documents:

Financial Statements (P&L and Balance Sheets)

- 2022
- 2023
- 2024
- Year-to-Date 2025 (through the most recent month)

Business Tax Returns

- 2021
- 2022
- 2023

Inventory / Materials

- Estimated value at cost (a ballpark figure is fine if exact numbers aren't available)

Furniture, Fixtures & Equipment (FF&E)

- Estimated fair market value, including vehicles

Accounts Receivable & Payable Aging Reports

- As of December 2024

Number of W-2 Employees

- Total number of current W-2 employees

How to Submit

Please gather your documents and email them to info@magnusbusinessgroup.com. If possible, submit financials in **Excel format** for easier review.

Next Steps

After reviewing your information, we'll schedule a meeting with you and/or your accountant to discuss further details and next steps.

Questions?

Feel free to call us at (805) 259-4795 — we are happy to help clarify any questions you might have.