



Business Valuation Checklist

To begin your business valuation, please gather the documents listed below and email them to info@magnusbusinessgroup.com. If possible, send financials in **Excel format** for easier review.

Financial Statements (P&L and Balance Sheets)

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

Business Tax Returns

- ☐ 2022
- ☐ 2023
- ☐ 2024

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

- ☐ Year-to-Date 2025 (through the most recent month)

Number of W-2 Employees

- ☐ Total number of current W-2 employees

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.