

Professional Service Provider  
**Consulting Capability Evaluation Form**

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# The Business Buyer Advocate.®

Showing People How to Buy the Right Business the Right Way

Please complete this form so we can give you more insight into our business. This form helps you and us assess your capability to prosper as a *Business Buyer Advocate*®. To expedite this, answer all questions and return the completed form to us by email file attachment or fax. You can demonstrate your capability by attaching your resume. Your information will be held in confidence.

## Personal & Vocation Information

Last name	First name	Middle name	Professional Designations
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Date this form submitted	Birth <u>day</u>	Telephone numbers (work & home)	Email Address
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Current <u>street</u> address	City	State	Zip	How long?
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Current <u>mailing</u> address (if different)	City	State	Zip
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Previous <u>street</u> address	City	State	Zip	How long?
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Name of your firm	City	State	Zip	How long?
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Describe your occupation & duties

Please disclose the nature and dates of ALL litigation, bankruptcy and foreclosures to which you have been a party.

**Please rate yourself on the following attributes**, using a scale of 1-5 with 1 meaning poor and 5 meaning excellent.

- Integrity
- Willingness and intent to make a good faith effort to implement Best Practices proven successful for Authorized Business Buyer Advocates
- Desire to help other people realize their dream of business ownership
- Assertiveness
- Perseverance (commitment to do what is necessary to succeed until you achieve your goal)
- Willingness to market your service, such as developing referral relationships with other advisors
- Ability to communicate with people (one-on-one and groups) a complex subject about which they are unfamiliar
- Familiarity with financial concepts and terminology, and *expertise on business management*
- Financial capability to support yourself until your business can
- Health condition

Use 1, 2, 3 and 4 to characterize your personality type for each characteristic below. 1 = most dominant thru 4 = least dominant.

- Amiable:** Building rapport & peer acceptance important. Easily makes friends. Wants approval. Decision delayer. Seeks security.
- Analytical:** Uncomfortable without details and/or system. Thinker, looks for/avoids trouble, cautious. Desire to be right.
- Director:** Driver, controller, seeks leadership position, competitive, sometimes impulsive, impatient, want results NOW.
- Expressive:** Socializer, relationship builder, let's do it (makes quick decisions, takes action), enjoys applause/approval.

**Professional/business references** we may contact: Name, address, daytime telephone number. We won't contact without your permission.

- 1.
- 2.
- 3.

# Your Business Plan

Why are you willing to [ ] give up or [ ] supplement what you currently do [ ] to earn a living to become a consultant or diversify your firm?

Specifically, to what degree have you provided services to business buyers, such as searching for businesses for sale or consulting?

We realize you might not work fulltime as an **Authorized Business Buyer Advocate** if you continue to provide the services you already offer. Your forecast below should reflect this. What percentage of your work time do you intend to devote to marketing services to business buyers and providing service to them?

\_\_\_\_\_ % Comments:

Please describe who you think will be your primary and secondary targets toward which you will market your service and then serve clients? Such as first time buyers, individual buyers, corporate buyers, private equity groups, small businesses that want to grow via M&A, etc.

How much money do you intend to spend each month to market services to business buyers, and how do you anticipate spending it? Examples: ads, direct mail, telemarketing, website, social networking online, networking with professional service providers, etc.?

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## Marketing activities:

What is the geographic territory from which you intend to provide client service? (i.e. your business office is in this major city or county.)

As an **Authorized Business Buyer Advocate** you consult with clients who buy small and midsize businesses. How will your education and experience help you succeed in this type of consulting?



What, if any, impediments exist to your success in the consulting business?

Why do you think it makes sense for you to get from us a Trade Secret, Know-How and Trademark License?

Why, specifically, do you have interest in possibly becoming an **Authorized Business Buyer Advocate**?

[ ] I attach my resume to this **Consulting Capability Evaluation Form**.

(If you are not comfortable providing details to us now, please call us to talk about how we can handle this later.)

I intend to evaluate becoming an **Authorized Business Buyer Advocate** because I have serious interest in it and then (if being one is mutually beneficial) I intend to do so within this many days of the date of this Consulting Capability Evaluation Form:

[ ] Less than 30 days [ ] 30 to 60 days [ ] 60 to 90 days [ ] Within this many months from today: \_\_\_\_\_

I submit the foregoing information and the attachments hereto as my complete and true personal condition, and my intent with respect to evaluating and possibly becoming an **Authorized Business Buyer Advocate**, as of the date shown below. I understand that you are relying upon all the above information as a material factor in considering my application to become **Authorized Business Buyer Advocate**, and I therefore agree to promptly notify you of any material change in any of the above information or any subsequent information provided to you. Your Trade Secrets will not be disclosed by me or my advisors to any other person or business entity, and will not be used in any manner outside my evaluation of **Authorized Business Buyer Advocate**, either during or after the evaluation process.

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

Signature: \_\_\_\_\_

Rev 6/23/10