

## **SELLING A BUSINESS:**

1. Lead comes in - call, email, text, FB message and connect
2. Conversation with clear communication of process and price (also outlined in Agreement)
3. Send Agreement via DocuSign for digital signatures with time stamps
4. Collect Signature & Verify Payment via wire only
5. Email W-9
6. Email 95 Questions for Due Diligence (also found on our website)
7. Open Google Drive Folder for them to Upload Docs
8. Complete Valuation
9. Market Business to Buyers
10. Have Buyers sign NDA via DocuSign & Verify Ability to Buy
11. Send Google Drive link
12. Receive LOI (Letter of Intent)
13. Negotiate Terms - Accept, Reject, Counter Offer
14. Due Diligence & Escrow (Goes to Closing Attorney)
15. Set up Site Visit
16. Asset or Stock Purchase Agreement (Drafted/Reviewed by Clients Attorney)
17. Closing

## **BUYING A BUSINESS:**

1. Lead comes in - call, email, text, FB message and connect
2. Conversation with clear communication of process and price (also outlined in Agreement)
3. Understand Buy Box and if it fits Blue Collar model
4. Send Agreement via DocuSign for digital signatures with time stamps
5. Collect Signature & Verify Payment via wire only
6. Email W-9
7. Sign NDA
8. Gather CIM & enter Data room
9. Put together LOI (Clients Attorney or We can draft)
10. Verify Seller Signatures
11. Client Sends Escrow (Goes to Closing Attorney)
12. Due Diligence
13. Set up Site Visit
14. Asset or Stock Purchase Agreement (Drafted/Reviewed by Clients Attorney)
15. Closing

### **TOOLS:**

Email  
Phone  
Google Drive  
DocuSign

### **FILES:**

Agreement  
NDA  
LOI  
Eval  
Due Diligence Request - 95 Questions  
W9

### **CLIENTS REQUIREMENTS:**

Buy OR Sell Attorney(s)  
Accountant/CPA(s)  
Banker(s)  
Work in Timely Manner