

As you can appreciate, client confidentiality is paramount. In order to accurately assess the suitability of your enquiry, and to gain permission from the Vendor to release information to you, we require the following information for you to provide. Once received we will call you to discuss further.

Your details

Name:

Best Contact number:

Email Address:

Physical Address:

Your Situation

Briefly describe what business activities you are currently involved in, including the entity name and your capacities (for example director / shareholder / working / passive), length of time, core activity:

What are the main reasons you are seeking to invest in a new enterprise?

What other parties or partners are involved in your potential business acquisition?

Your Enquiry

What are your preferred industry sectors?

What are your preferred geographical locations?

What is the investment value range you are considering?

What is appealing to you in regard to this specific advertisement?

Please describe your investment criteria, or ideal business investment profile:

Your Investment

What is your ideal role or involvement in a potential investment?

What is your ideal investment timing?

Are you reliant on third party funding to achieve your investment value range?

Your Background

Briefly describe what business activities you have been involved in over the past 5 – 10 years:

Please provide details of any business purchase activities you have been involved in over the past 5 years:

Your Activity

How long have you been actively seeking new investment opportunities:

What is the furthest stage you have reached on any recent enquiry / transaction?

What were the reasons you have not completed on any enquiry / transactions?

What has been your key frustration on recent enquiry activity?

Thank you for taking the time to complete this information. Please scan and email back to directors@myadvisor.co.nz
Once received we will be in contact immediately to discuss further your enquiry.

Office Use:	Source:	Advertising Reference Number:			Date received:	
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