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Client Data Entry Sheet

For industry coding use the following abbreviations: MFG – Manufacturing, SER – Service, RET – Retail,
WHS – Wholesale, CON – Construction, MISC – Miscellaneous

NEW _____ REMOVE _____ UPDATE _____

IND _____ BROKER _____

BBN #/OR OTHER # _____ CITY _____ STATE _____

BUSINESS DESCRIPTION _____

ASKING PRICE \$ _____ ANNUAL SALES \$ _____

CASH FLOW \$ _____ ASSETS INCL IN SALE \$ _____

REAL ESTATE VALUE \$ _____ % OWNER FINANCING _____

COMMENTS: _____