

# CORPORATE INVESTMENT BUSINESS BROKERS

## BUSINESS BROKERS of FLORIDA

STANDARD "CONFIDENTIALITY/DISCLOSURE"

# BBF

Member

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_  
herein known as PROSPECT, acknowledges and agrees that PROSPECT approached Corporate Investment Business Brokers (BROKER), and that **BROKER** was the first to advise them of the availability and details concerning the following business and/or real property opportunity:

LISTING NUMBER: \_\_\_\_\_ BUSINESS DESCRIPTION: \_\_\_\_\_

1. PROSPECT understands and agrees that all dealings concerning the opportunity above will be handled through **BROKER** and that **BROKER** has entered into agreements with Sellers for the payment of commissions. **BROKER** will furnish to PROSPECT certain proprietary information relating to the various operations, properties, personnel, financial and other matters which are non-public, confidential or proprietary in nature and are hereinafter referred to as "Proprietary Information." The Proprietary Information will be kept confidential and shall not, without the prior written consent of **BROKER**, be disclosed by PROSPECT or its agents, representatives or employees, in any manner whatsoever, in whole or in part, and shall not be used by PROSPECT, its agents, representatives or employees, other than in connection with the purchase of one of the opportunities described above. PROSPECT shall be fully responsible for any breach of this Agreement by itself, its agents, representatives or employees. The Proprietary Information (including any copies thereof), will be returned to **BROKER** immediately upon **BROKER'S** request. PROSPECT agrees that it shall not retain any copies of the Proprietary Information supplied pursuant to the terms and conditions of this Agreement.

2. Any and all information provided to PROSPECT is provided for informational purposes only. **BROKER** does not make any representations and/or warranties as to the accuracy of the information provided and that PROSPECT is to make his or her own independent evaluation of the opportunities described above. PROSPECT acknowledges that **BROKER** has advised PROSPECT to seek independent professional advice in the review and evaluation of the information provided and that PROSPECT should seek the advice of an attorney and/or certified public accountant.

3. In the event PROSPECT discloses the availability of said designated opportunities to a third party who purchases a business without **BROKER** assistance, then PROSPECT, in addition to the remedies specified herein, is also responsible for payment of **BROKER'S** compensation which would have been paid on the listed selling price or minimum compensation, whichever is greater.

4. For two years from the date of this Agreement, PROSPECT agrees not to deal directly or indirectly with the Sellers of the opportunities listed above without the prior written consent of **BROKER**. If PROSPECT enters into a sale and/or purchase agreement, a management contract or other financial arrangement with a Seller of an opportunity, including a leasing of the business premises from the Seller or its Landlord is consummated, PROSPECT shall be liable for any and all damages **BROKER** may suffer, including but not limited to the Seller's commission payable on the sales price or minimum commission due under the Listing Agreement with Seller, whichever is greater and, any commission due on the lease agreement negotiated with the Landlord. PROSPECT agrees and does hereby appoint **BROKER** its attorney in fact to execute all documents necessary to place a lien on the business assets to collect its compensation, and this Agreement shall be the consent to do so as required by Florida Statute 475.42.

5. This Contract shall be governed by the laws of the state of Florida. Any breach of this Agreement shall result in the prevailing party being entitled to receive from the other party all of its reasonable attorney's fees, costs, and expenses incurred at both the trial and appellate levels. The parties hereby consent to personal jurisdiction and venue, for any action arising out of a breach or threatened breach of this Agreement in the Circuit Court in and for LEE County, Florida. The parties hereby agree that any controversy which may arise under this Agreement would involve complicated and difficult factual and legal issues. Therefore, any action brought by either party, alone or in combination with others, whether arising out of this Agreement or otherwise, shall be determined by a Judge sitting without a jury.

6. The Seller is the intended beneficiary of all covenants of PROSPECT which benefit the Seller, including without limitation the covenants concerning the use of information disclosed to PROSPECT, and a Seller may bring an action to enforce such covenants. PROSPECT represents and warrants to **BROKER** that PROSPECT does not represent a third party, governmental agency or competitor of the business, nor is PROSPECT employed by a competitor and the sole purpose for receiving any information regarding a business is to purchase said business. PROSPECT acknowledges receiving a copy of this Agreement and a facsimile copy with signatures shall be considered as original.

PROSPECT 1 Signature \_\_\_\_\_ Date \_\_\_\_\_

Area Code \_\_\_\_\_ Telephone Number \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

PROSPECT 2 Signature \_\_\_\_\_ Date \_\_\_\_\_

Area Code \_\_\_\_\_ Telephone Number \_\_\_\_\_

Identification Source \_\_\_\_\_

CORPORATE INVESTMENT BUSINESS BROKERS

Dave Williams, Dan Smith, Joe Marks, Andrew Welsh  
Broker/Agent \_\_\_\_\_ Date \_\_\_\_\_

# BUYER QUALIFICATION FORM

Due to the sensitive nature of the Company information, we must legitimize each inquiry by pre-qualifying interested parties prior to the release of proprietary Company details. Therefore, in order to become eligible to receive detailed Company information, please complete the forms that were sent to you in their entirety. All information is held **strictly confidential**. If you elect not to complete the forms, that is your option. But, unfortunately, without the forms fully completed we cannot convey any additional information. We would like to work with you, but we do need these forms completed.



First Name: \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home #: \_\_\_\_\_ Mobile #: \_\_\_\_\_ Fax #: \_\_\_\_\_

Email: \_\_\_\_\_

Are you relocating? \_\_\_\_\_

Are you currently employed? \_\_\_\_\_

Are you looking for an E-2 Visa? \_\_\_\_\_

- Profession \_\_\_\_\_

Would you consider franchises? \_\_\_\_\_

- Industry \_\_\_\_\_

Area of Interest? ☐ Lee ☐ Collier ☐ Charlotte ☐ Sarasota

☐ Other Area: \_\_\_\_\_

When will you be ready to close on a business? ☐ 1-3 Months

☐ 3-6 Months ☐ 6-9 Months ☐ Other: \_\_\_\_\_

## Types of Businesses You're Interested in:

1.) \_\_\_\_\_ 2.) \_\_\_\_\_

3.) \_\_\_\_\_ 4.) \_\_\_\_\_

## Types of Businesses You're NOT Interested in:

1.) \_\_\_\_\_ 2.) \_\_\_\_\_

3.) \_\_\_\_\_ 4.) \_\_\_\_\_

**FINANCIAL:** Down Payment Available: \$ \_\_\_\_\_ Is this Down Payment available now? \_\_\_\_\_

Source of Down Payment: ☐ Savings ☐ 401K ☐ Home Equity Loan ☐ SBA (Pre-Qualified) ☐ Other: \_\_\_\_\_

How is your credit? \_\_\_\_\_ Have you ever filed for bankruptcy? \_\_\_\_\_

ASSETS	AMOUNT	LIABILITIES & NET WORTH	AMOUNT
Cash	\$	Notes Payable	\$
US Government Securities	\$	Liens on Real Estate	\$
Accounts, Loans, & Notes Receivable	\$	Other Liabilities	\$
Other Stocks and Bonds	\$		
Real Estate	\$	<b>Total Liabilities</b>	\$
Other Assets	\$		
<b>Total Assets</b>	\$	<b>NET WORTH</b>	\$

Note: An estimated personal or business financial statement is required of all interested parties before receiving sensitive financial records & confidential information about any business listing. A letter from your lender stating the amount & type of business for which you are qualified or an account statement showing sufficient funds for purchase may be substituted for the financial statement.

As a service to our customers your email will be added to our list to receive weekly updates notifying you of new business offerings and changes. If you do not want to be notified, please check here. ☐ I am opting out to receive emails.

The undersigned certifies that this information is true and correct to the best of their knowledge.

**Signature**

**Date**