Pre-sale preparation checklist

Build a file that lets a buyer price your shop without guessing about owner pay, membership obligations or the license holder.

How to use this file

1. Date the file to the last closed month and name one person accountable for each open item.
2. Use a redacted sample before releasing customer or employee details. Record where the underlying record lives.
3. Review exceptions with your advisor before you circulate a price range.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Educational planning template. Verify your figures and assumptions with your transaction advisors.

Prove the earnings

□ Reconcile monthly P&Ls to year-end statements and explain unusual inventory or job-cost entries.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Attach invoices and payroll detail to proposed add-backs. Price the manager, estimator or qualifier work you still perform.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Split service, replacement, maintenance and new-construction revenue. Note any policy changes between years.

Owner and target date _____

Evidence or exception _____

Next action _____

Trace tomorrow’s obligations

□ Roll opening active memberships forward through additions, expirations, cancellations and refunds.

Owner and target date _____

Evidence or exception _____

Next action _____

□ List paid-up visits you still owe by month. Reconcile collected cash to earned revenue.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Age open installations and warranty callbacks. Name the technician, parts cost and expected completion date.

Owner and target date _____

Evidence or exception _____

Next action _____

Document the handoff

□ Identify the license holder for each jurisdiction and ask the authority about the proposed ownership change.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Map who approves pricing exceptions, dispatch changes and equipment orders when you take time off.

Owner and target date _____

Evidence or exception _____

Next action _____

□ List consents, outstanding vehicle liens, premises terms and insurance renewal dates before setting a closing target.

Owner and target date _____

Evidence or exception _____

Next action _____