



Document Checklist

What buyers usually ask to see. Gather copies in one folder before you talk with serious buyers. Only share private documents after a confidentiality agreement (NDA) is signed.

Please note: this is general information, not legal, tax or financial advice. Please talk with your own lawyer and accountant before you decide anything.

Money

- ☐ Financial statements, last 3 years
- ☐ Business tax returns, last 3 years
- ☐ This year's figures to date
- ☐ GST/HST filings
- ☐ Bank statements (recent months)
- ☐ List of debts and loans

What the business owns

- ☐ Equipment and vehicle list with rough values
- ☐ Stock (inventory) list
- ☐ Business name, website and social accounts
- ☐ Customer and supplier lists (share only late, with an NDA)

Agreements

- ☐ Lease and any amendments

☐ Key customer and supplier contracts

☐ Licences and permits

☐ Insurance policies

☐ Franchise agreement, if any

People

☐ Staff list: roles, years of service, pay (names can be left out at first)

☐ Any employment contracts

Company records (for a share sale)

☐ Articles of incorporation

☐ Minute book and share register

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