

## Information Memorandum Template

The Information Memorandum is the first step in the sales process in terms of collating and presenting key information to potential purchasers. This template provides a sample of **how** and **what** needs to be presented to go to market.

As with most things, success is in the preparation. This template should be prepared in advance of going to market and its accuracy is paramount. Nothing will stall the negotiation process more than having inaccurate information. You should never expect a purchaser to make an offer based purely on the P & Ls.

As a purchaser, if you have only been provided with financials thus far, you too can utilise this template to give to a vendor to obtain the pertinent data for consideration.

This template enables you to be well prepared as you take the first steps in your sales transaction.

### Order Form & Tax Invoice (ABN: 98 001 441 578)

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Contact: \_\_\_\_\_

Firm: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

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

**Cost (Inclusive GST)**

**Information Memorandum Template:**            \$165.00

**EFT Account name:** Rob Knights Practice Broking Pty Limited **BSB:** 082 057 **Account No:** 599634551

Mastercard                               Visa                               Amex

Cardholder's Name: \_\_\_\_\_ Card No: \_\_\_\_\_

Signature: \_\_\_\_\_ Expiry date: \_\_\_\_\_ / \_\_\_\_\_