

Firm Acquisition Request Form – Buyer

Practice Areas/Industries

Accounting and Tax Services

Could the seller keep their existing office/location(s), or will they need to physically relocate?

Keep

Please list any practice areas you're not interested in (i.e., a significant volume of 1040s, financial statement work, etc.).

Audits

What are your primary reasons for a merger?

Acquiring talent

Growth

In addition to acquiring the business, will you retain the existing staff?

Yes

Are you only interested in acquiring retirement-minded practitioners?

No

Will you consider a deal with some cash up front, or do you intend to finance the transaction over time?

Finance