

VIVIAN SRAM LIMITED

PRACTICE MERGER CONSULTANTS

QUESTIONNAIRE ACQUIRER IN PRACTICE

FIRM NAME

LOCATION

DATE

REF:
Office Use Only

SECTION I - CONTACT INFORMATION

<i>FIRM NAME</i>	
<input type="text"/>	
<i>CONTACT NAME</i>	<i>CONTACT POSITION</i>
<input type="text"/>	<input type="text"/>
<i>CORRESPONDENCE ADDRESS</i>	<i>WORK TEL:</i>
<input type="text"/>	<input type="text"/>
	<i>MOBILE TEL:</i>
	<input type="text"/>
	<i>HOME TEL:</i>
	<input type="text"/>
	<i>FAX:</i>
	<input type="text"/>
	<i>E-MAIL:</i>
	<input type="text"/>

SECTION II - GENERAL INFORMATION

<i>AGE OF PRACTICE</i>	<input type="text"/>
<i>ANY ASSOCIATIONS WITH OTHER FIRMS</i>	<input type="text"/>
<i>DETAILS OF ASSOCIATIONS</i>	<input type="text"/>
<i>DATE OF YEAR END</i>	<input type="text"/>
<i>ARE YOU REGISTERED FOR AUDIT</i>	<input type="text"/>
<i>ARE YOU AUTHORISED FOR INVESTMENT BUSINESS/CATEGORY</i>	<input type="text"/>
<i>IF YOUR TURNOVER IS BELOW THE VAT THRESHOLD ARE YOU REGISTERED FOR VAT?</i>	<input type="text"/>
<i>PROFESSIONAL INDEMNITY INSURANCE (Y/N)</i>	<input type="text"/>
<i>ANY CLAIMS PENDING UNDER ABOVE</i>	<input type="text"/>
<i>DATE OF LAST QAD VISIT</i>	<input type="text"/>
<i>RESULT OF LAST QAD VISIT</i>	<input type="text"/>

SECTION III - PARTNERS

NAME

AGE

QUALIFICATIONS

SPECIALISMS

NAME

AGE

QUALIFICATIONS

SPECIALISMS

NAME

AGE

QUALIFICATIONS

SPECIALISMS

NAME

AGE

QUALIFICATIONS

SPECIALISMS

NAME

AGE

QUALIFICATIONS

SPECIALISMS

NAME

AGE

QUALIFICATIONS

SPECIALISMS

SECTION IV - CLIENT INFORMATION

TURNOVER

NUMBER OF CLIENTS

AVERAGE FEE SMALLEST FEE LARGEST FEE

LOCALITY/RADIUS OF OFFICE

DOES THE PRACTICE HAVE A PREPONDERANCE OF ANY PARTICULAR CLIENT TYPE

SECTION V - OFFICE DETAILS

LOCATIONS

ARE THE OFFICES LEASED OR OWNED

IF OWNED DETAILS OF OWNERSHIP

IF LEASED:

HOW LONG IS THE LEASE/ANY BREAK CLAUSE

WHAT IS THE TOTAL COST P.A.

HOW MANY SQUARE FEET

HOW MANY MORE STAFF COULD YOU ACCOMMODATE

SECTION VI - DAY TO DAY RUNNING

WHAT SOFTWARE DOES THE PRACTICE USE FOR:

AUDIT/ACCOUNTS

TAX

OTHER (SPECIFY)

AVERAGE PARTNER CHARGE-OUT RATES

AVERAGE WORK IN PROGRESS AVERAGE DEBTORS

SECTION VII - STAFF

FULL TIME

No.	JOB TITLE/DESCRIPTION	QUALIFICATIONS

PART TIME

No.	JOB TITLE/DESCRIPTION	QUALIFICATIONS

SUBCONTRACTORS

No.	JOB TITLE/DESCRIPTION	QUALIFICATIONS

CONSULTANTS

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VIVIAN SRAM LUMUTED

SECTION VIII - EXPANSION PLANS

BY WHICH OF THE FOLLOWING METHODS DO YOU WISH TO EXPAND YOUR PRACTICE?

*OUTRIGHT PURCHASE –
TOTAL PRACTICE / BLOCK OF FEES*

*WORKING RELATIONSHIP WITH EXISTING
PRINCIPAL UNTIL RETIREMENT*

MERGER

*HOW LARGE A BLOCK OF FEES/PRACTICE WOULD YOU CONSIDER ACQUIRING
(IN TERMS OF TURNOVER)*

DO YOU WISH FEES TO BE PORTABLE INTO YOUR EXISTING OFFICE(S)?

*DO YOU WISH TO OPEN, OR WOULD YOU CONSIDER OPENING, AN ADDITIONAL OFFICE?
AND IF SO WHERE?*

WHAT TYPES OF FEES WOULD YOU PREFER?

*ARE THERE ANY FIRMS OR INDIVIDUALS TO WHOM YOU WOULD NOT WISH TO BE INTRODUCED
THROUGH VIVIAN SRAM LIMITED?*