

VIVIAN SRAM LIMITED

PRACTICE MERGER CONSULTANTS

QUESTIONNAIRE MERGER

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	<input type="text"/>	AGE	<input type="text"/>
QUALIFICATIONS	<input type="text"/>		
SPECIALISMS	<input type="text"/>		
EQUITY SHARE	<input type="text"/>	PROFIT SHARE (IF DIFFERENT)	<input type="text"/>

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QUALIFICATIONS	<input type="text"/>		
SPECIALISMS	<input type="text"/>		
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SPECIALISMS	<input type="text"/>		
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SECTION IV – CLIENT INFORMATION

TURNOVER

PROFIT

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					
<i>JOB TITLE</i>	<i>AGE</i>	<i>LENGTH OF SERVICE</i>	<i>QUALIFICATIONS</i>	<i>SALARY</i>	<i>CHARGE OUT RATE</i>

PART TIME					
<i>JOB TITLE</i>	<i>AGE</i>	<i>LENGTH OF SERVICE</i>	<i>QUALIFICATIONS</i>	<i>SALARY</i>	<i>CHARGE OUT RATE</i>

SUBCONTRACTORS				
<i>JOB DESCRIPTION</i>	<i>HOURS WORKED</i>	<i>RATE PER HOUR</i>	<i>CHARGE OUT RATE</i>	

CONSULTANTS

SECTION VIII – ANALYSIS OF FEES

SPLIT OF FEES BY WORK TYPE

TOTAL BY NO.	RECURRING WORK	£
	LIMITED COMPANIES (FULL AUDIT)	
	LIMITED COMPANIES (NO AUDIT)	
	PARTNERSHIPS / SOLE TRADERS	
	TAX CASES	
	OTHER (SPECIFY) _____	
	RECURRING WORK TOTAL	
	NON RECURRING WORK	
	CONSULTANCY	
	OTHER (SPECIFY) _____	
	NON RECURRING WORK TOTAL	
	TOTAL FEES ACTUAL/BUDGET	

SPLIT OF FEES BY AMOUNT

TOTAL BY NO.		£
	£0 - 250	
	£250 - 500	
	£500 - 1,000	
	£1,000 - 2,500	
	£2,500 - 5,000	
	£5,000 – 10,000	
	>£10,000	
	TOTAL FEES ACTUAL/BUDGET	

SECTION IX – MERGER CRITERIA

WHAT SIZE OF FIRM WOULD YOU CONSIDER AS A MERGER PARTY

NUMBER OF PARTNERS

TURNOVER PER PARTNER

DO YOU WISH THE MERGER PARTY TO BE PORTABLE INTO YOUR PREMISES? IF SO, HOW MUCH ROOM DO YOU HAVE?

WOULD YOU CONSIDER MOVING INTO THE OTHER PARTY'S OFFICES?
IF SO :-

HOW MUCH ROOM WOULD YOU NEED?

WHICH LOCATIONS WOULD YOU CONSIDER?

ARE THERE ANY SPECIALISMS THAT WOULD BE OF PARTICULAR INTEREST TO YOU?

DO YOU HAVE ANY SPECIALISMS THAT YOU WOULD LIKE TO EMPHASISE

SECTION X – MISCELLANEOUS


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



ARE YOU CURRENTLY IN NEGOTIATION WITH ANY FIRM(S) OR INDIVIDUALS? IF SO WHOM?



ANY ADDITIONAL RELEVANT INFORMATION



SECTION XI - WOULD YOU CONSIDER ACQUISITION ?

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

*OUTRIGHT PURCHASE –
TOTAL PRACTICE / BLOCK OF FEES*

*WORKING RELATIONSHIP WITH EXISTING
PRINCIPAL UNTIL RETIREMENT*

*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?*