
PROVIDENT VALUATION PROFESSIONALS, INC.

CREDENTIALLED BUSINESS VALUATION, FORENSIC ACCOUNTING AND LITIGATION SUPPORT SERVICES

Initial Valuation Engagement Information

Client Information

Name of Client	
Title	
Client Company Name	
Address	
City, State, Zip	
Telephone	Fax
Email	
Relationship of Client To Subject Company	

Subject Company Information

Name of Subject Company 's Contact Executive	
Title	
Subject Company Name	
Address	
City, State, Zip	
Telephone	Fax
Email	
Brief Description of the entity's business	
Number of Locations of Branches or Divisions	
Approximate Annual Gross Revenue for Immediately Preceding Fiscal Year	
Accounting and Tax Year End (Month)	
Type of Legal Entity (Corporation, S- Corporation, LLC, etc.)	

Date Incorporated/Organized	Federal ID Number
No. of Shares Authorized	No. of Shares Issued & Outstanding
Is there only one class of stock?	Is all the stock common stock?
If no to any of the above, please explain	
If stock is restricted, please explain	
Recent stock sale information:	
Type of stock sold	Sold to
Percentage sold	Restrictions, if any
Type of stock sold	Sold to
Percentage sold	Restrictions, if any
Valuation Essentials:	
Purpose of valuation	
Describe the Interest to be Valued (percentage to be valued, controlling, minority interest)	
Type of Report (Formal Written, Short Form Written, Oral)	
Expected Definition of Value (if known)(fair market value, intrinsic value, fair value, etc.)	
Proposed Deadline for Completion of Report	
Intended Distribution of the Report:	
Name	Position
Company	
1.	
2.	
3.	
4.	
Restricted to Internal Use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Distributed to Third Parties?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Will an Asset Appraiser Be Engaged by the Client If Needed?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If no, please explain (could be a restricted engagement)	

Is Expert Witness Testimony Expected to Be Provided? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please explain	
Valuation date	Number of shares to be valued
Percentage of shares to be valued	
Information Contact Person:	
Name	Title
Address	
Telephone	Fax
Email	Cell
Physical Location of Subject Company	
Address	Lease / Own
Date Occupied Latest Facility	
Additional Financial Information:	
Who generates financial statements? In house <input type="checkbox"/> CPA <input type="checkbox"/> If CPA, Audited, Reviewed or Compiled?	
If other, please describe	
How often are financial statements prepared?	

Thank you for providing us this information. If you have any questions or concerns, please feel welcome to contact us at your slightest inclination.

Provident Valuation Professionals, Inc.
Secure U.S. Post Office Box 1120
Lake Forest, CA 92609-1120

Telephone (949) 716-4875
Facsimile (949) 583-0161

Email Info@ProvidentValuationProfessionals.com
Internet www.ProvidentValuationProfessionals.com