

Valuation Onboarding Questionnaire

Elite Valuation Authority – Confidential Document

Section 1 — Contact Information

- Client Name:
- Company / Organization:
- Position / Title:
- Email:
- Phone:
- Website (if applicable):

Section 2 — Engagement Details

- Type of valuation requested:
- Purpose of valuation:
- Intended recipients of report (auditor, investor, bank, court, etc.):
- Expected timeline / deadline:
- Any urgency?

Section 3 — Company / Asset Information

For Business Valuations:

- Company name & registration number
- Sector / industry
- Country and operating locations
- Year founded
- Ownership structure
- Number of employees
- Short company description

For Real Estate Valuations:

- Property address
- Property type (residential, commercial, industrial, land)
- Size (sqm or ha)
- Ownership title
- Rental income (if applicable)

For Startup Valuations:

- Product / service description
- Funding history
- Cap table
- Current traction
- Forecasts (if available)

For Tangible Assets:

- Asset list
- Age / purchase date
- Technical specifications
- Condition assessment

For IP / Intangibles:

- Description of intellectual property
- Registration certificates

- Market applications
- Revenue attribution (if applicable)

Section 4 — Financial Information

Please provide available documents:

- Last 3–5 years of financial statements
- Current-year management accounts
- Forecasts or business plan
- Loan agreements
- Significant contracts
- Auditor reports
- Budget/cost breakdown
- Additional financial documents (optional): _____

Section 5 — Operational & Strategic Information

- Key products/services
- Main customers and suppliers
- Competitive landscape
- Risks and opportunities
- Planned investments or changes
- External factors affecting value

Section 6 — Additional Notes

Please share any relevant information that may influence the valuation:

Client Declaration

I confirm that the information provided is accurate to the best of my knowledge and may be used strictly for valuation purposes in accordance with Elite Valuation Authority's confidentiality and GDPR policies.

Signature: _____

Date: _____