



# INQUIRY WORKSHEET

This worksheet will help you find the building blocks for your acquisition strategy and inquiry messaging. Remember, as an EMS Grow member, your membership team can help you shape and polish your base inquiry message, and tailor it to a specific acquisition target.

What is the value of your business? \_\_\_\_\_

## Strategy

1. Target acquisition value (no larger than your business value): \_\_\_\_\_
2. Describe your ideal client:  
\_\_\_\_\_  
\_\_\_\_\_
3. Briefly describe your ideal acquisition:  
\_\_\_\_\_  
\_\_\_\_\_
4. How will your ideal acquisition complement your existing business?  
\_\_\_\_\_  
\_\_\_\_\_

## Value Proposition

1. What are two things that make your practice exceptional?  
\_\_\_\_\_  
\_\_\_\_\_
2. Your buyer's statement in 2–3 sentences (this is the base of your inquiry message):  
\_\_\_\_\_  
\_\_\_\_\_

## Deal Structure & Financing

1. Cash available for down payment (should be 25–33% of your target acquisition value):  
\_\_\_\_\_
2. List your current financing resources:  
\_\_\_\_\_  
\_\_\_\_\_



## Submitting an Inquiry

1. **Log in to your account at [fptransitions.com](https://fptransitions.com).**

2. **Find your acquisition target.**

If your target doesn't appear at the top of the listings page, you may need to adjust your filters or select "view more."

3. **Review the listing information, including the seller's profile.**

Confirm your match by reading details, like sources and types of income, client demographics, preferred qualifications, and professional designations.

4. **Click "submit inquiry."**

5. **Complete the inquiry form.**

Your inquiry automatically populates with data from your buyer's profile, but you can review and update all entries before submitting it to the seller.

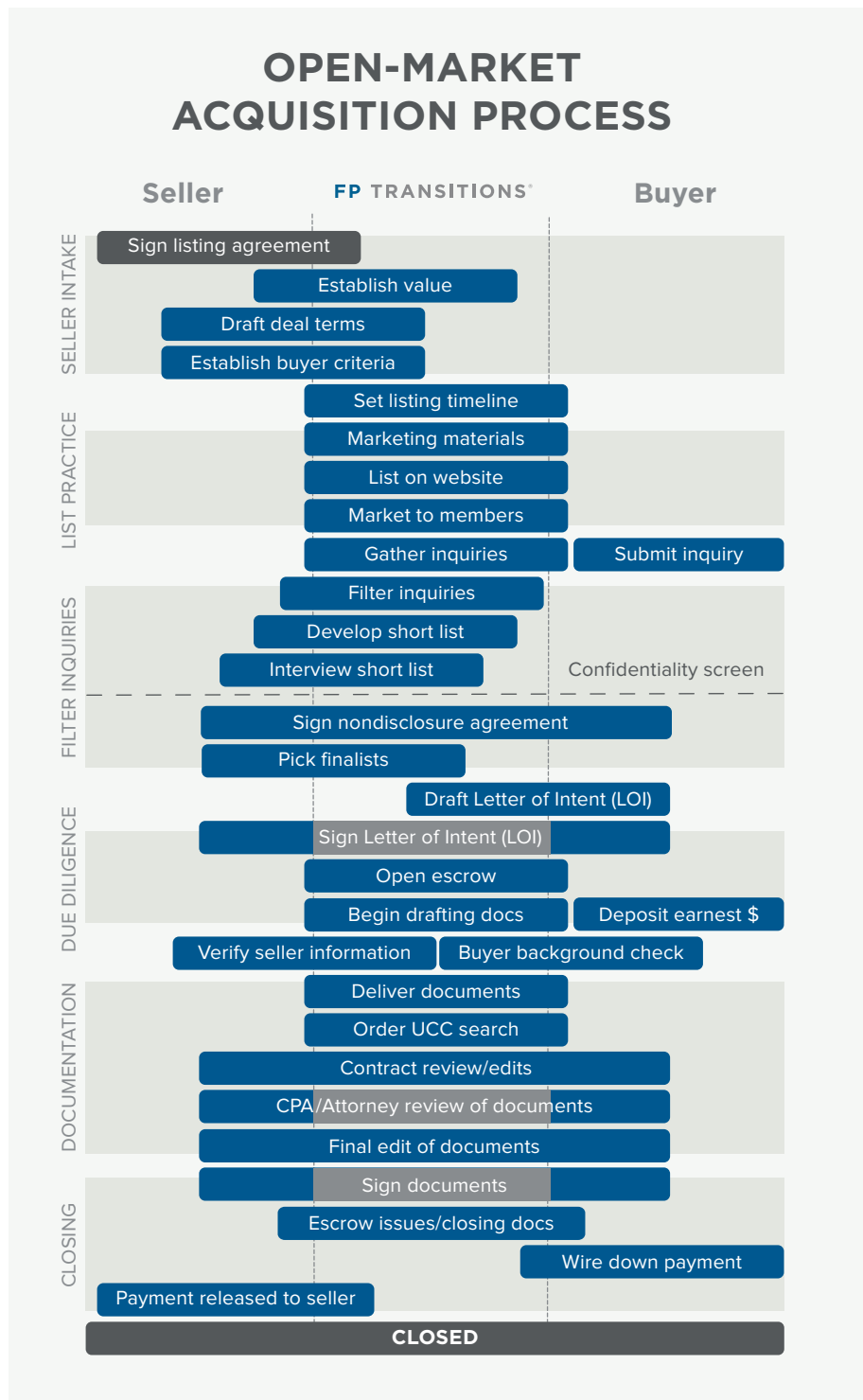
Indicate your financing and source of down payment.

Write your personal message to the seller, reflecting your suitability for the practice based on the above criteria.

6. **Accept the buyer's terms and conditions and submit the inquiry to the seller.**

7. **Be patient.**

Sellers typically receive an average of 85 inquiries and it takes time to screen inquiries to find buyers who fit their criteria.



Explore our Equity Management System® (EMS) membership options at [fptransitions.com/EMS](https://fptransitions.com/EMS) or schedule a call at [fptransitions.com/schedule](https://fptransitions.com/schedule).