

BUYER SIGN-UP PROCESS

STEP

1

Visit www.apboe.com to sign-up as a buyer

Buyers are required to enter **basic information** including name, email, phone number, password, as well as opting in or out of new seller listing notifications.

STEP

2

Getting Started section

Once an account is created, buyers are automatically directed to the “Getting Started” page to fill out **high-level practice information** such as: revenue breakdown, employees & staff count, and firm status information (current standing with FINRA and the SEC).

STEP

3

Practice Profile section

After the “Getting Started” page, buyers are automatically navigated to the “Practice Profile” section. The practice profile section asks for additional practice information such as practice location, business relationships with banking and consultation partners, current valuation, and acquisition history. Additionally, explanations of business operations in the practice overview, investment philosophy, and service model are required to be entered. If there are any specialties or niches for the practice, these sections are the best place to explain them, as it is important to note for practices that are looking for certain areas of expertise.

STEP

4

Verification process

The final step to complete a buyer account is the “Verification” process. The Verification process consists of submitting two pieces of business documentation to the “Verification” tab within your APBOE account.

The first piece of documentation to collect would be **either**:

- YTD or previous year’s P&L

The second piece of documentation would be either a:

- Breakdown of All Model Investment Portfolios utilized
- OR**
- One Sample Model Investment Portfolio

Once these are submitted, our SkyView team will review them and compare them to the financials entered into the buyer account. Once completed, the buyer will receive a Verified PurchasingPower™ score.

TIP

The purpose of the APBOE verification process is to provide sellers with increased transparency on a buyer’s practice and determine serious and qualified buyers. Buyers have the ability to submit other pieces of documentation such as a business valuation, a credit authorization, and utilization of M&A consulting services.

These pieces are optional to submit; however, they serve to:

- Provide sellers with more information on the buyer’s practice,
- Complete buyer diligence requests early, and
- Increase a PurchasingPower™ score due to more in-depth information on the practice.