

Early disclosure list

One line for each weak spot a buyer can find in your records. Write the evidence you hold, when you will raise it and who owns it. Tick the box once the buyer has seen it.

Your business

Weak spot a buyer can find	Evidence you hold	Raise it when	Who owns it	Seen
Installation margin by job				☐
Unbooked engineer hours				☐
Company F-gas ticket				☐
Gas Safe registration				☐
Gas work only one can do				☐
Tickets ending in a year				☐
Open callbacks, costed				☐
Uncommissioned installs				☐
Installs under warranty				☐
Debts past their terms				☐
Disputed invoices				☐
Retention release dates				☐
				☐

What you will fix before a sale, and by when

A line with no evidence is the first thing to fix. Type into the PDF and save it, or print it.