

Listing evidence worksheet

One sheet for each listing. Copy in what the listing says, tick a line when the document arrives, and note what is still open.

Listing reference and date

Listing line	What the listing says	Document that would prove it	Sent	Still open
Turnover		Accounts, VAT returns and turnover by kind of work	☐	
Recurring income		Contract list and signed terms	☐	
Adjusted profit		Add-back schedule and the owner's week	☐	
Team and tickets		Company certificates and every engineer's card	☐	
Customers		Turnover by customer, largest first	☐	
New-build work		Order book with notice and start dates	☐	
Reason for sale		Handover terms, in writing	☐	
Price		Shares or assets; cash, debt and stock	☐	
Plant (not listed)		Asset list with gas and charge	☐	
Past installs (not listed)		Install register and open callbacks	☐	
Money owed (not listed)		Aged debtors and retention schedule	☐	

What you need before you offer, who will get it and by when

Type your answers in and save a copy, or print the page and fill it in by hand. Nothing you enter is sent to us.

