



CBI TRANSACTION SUBMITTAL FORM

This form is used for CBI recertification credits for completed business transactions (10 credits per transaction). Please complete this form for each transaction, attach the required documentation and return to education@ibba.org. Documentation received without this form will not be processed.

TRANSACTION NAME: _____

CLOSING DATE: _____

TOTAL SELLING PRICE: _____

REAL ESTATE VALUE: _____

CLOSING ESCROW COMPANY AND/OR ATTORNEY: _____

INTERMEDIARY: _____

INTERMEDIARY'S FIRM: _____

Applicant should provide the following documents as proof of the transaction and as proof that the intermediary firm was the intermediary of record.

1. **SIGNED Closing Statements** demonstrating the total sale, asset content of real estate (if any) and intermediary commissions paid at closing. If a Closing statement is not available due to a Private Equity Closing, or "self-handled" company accretion, an affidavit from the attorney, accountant, PEG, or your client ON THEIR RESPECTIVE LETTERHEAD should be provided and signed by a principal, or the signed letter should describe the deal and verify its Closing and the Primary Intermediary. (see attached sample letter).
2. In addition to the above, if the Applicant is a member of a Firm that operates as a "team" or a "subcontractor" to the Firm, the Principal of the Firm (or participating Partner(s)) should provide a Notarized Affidavit that verifies that the Applicant was the "Primary Intermediary" and managed the primary responsibilities of the transaction.
3. In addition to 1 & 2 above, please consider submitting an IBBA Business Sale Submittal Form (Revised March, 2003) for "Pratt's Stats". This is not a requirement but will aid the IBBA and the M&A Source with databases through Pratt's Stats as well as the Applicant who will receive database access.

I attest to the above and attached information to be factual and true.

Signed: _____ Date: _____



Sample Letter

Attorney, Accountant, PEG or Client Letterhead

Date:

IBBA Headquarters
7100 E. Pleasant Valley Rd.
Suite 160
Independence, OH 44131

RE: _____

To Whom It May Concern:

This letter will serve to confirm that _____ of _____ acted as the Primary Intermediary in the following transaction representing _____.

TRANSACTION NAME:

SELLER:

BUYER:

CLOSING DATE:

SELLING PRICE:

REAL ESTATE VALUE:

I affirm that the above is true in all respects.

Regards,

Signature, Title