



CBI TRANSACTION SUBMITTAL FORM

This form is used for submitting 3 transactions to show proof of being the Lead Seller Broker for initial CBI Certification. Please complete this form for each transaction (3), 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