

Bring these six items to your free consultation. With them in place, we can prepare your compiled financials, support your valuation, and move through buyer due diligence fast.



Update CPA compilation report

Current CSRS 4200 compiled statements show buyers a verified financial status.

1



Reconcile bookkeeping data

Fix errors in QuickBooks or Xero so the numbers tie out before review.

2



Confirm tax filings (T2 / GST-HST)

Bring every filing current. A missing return stalls due diligence.

3



Review shareholder agreements

Clarify ownership rights now and prevent disputes at closing.

4



Prepare operational dependency list

Point out the critical people, processes, and suppliers for handover.

5



Assemble advisory team

Get your CPA, legal, and M&A experts on board early.

6

Pro Tip

Start about 12 months out. Compiled financials, tax planning, and documentation all take time, and early prep helps you avoid price discounts during due diligence.

What happens next

1 Book a free call

We review your goals and how sale-ready you are.

2 Share your records

Send the checklist items through our secure portal.

3 We get you sale-ready

Compiled financials, valuation prep, and tax planning.