

Business Name

Legal Form of Business

- Sole Proprietor
 S Corp.
 C Corp.
 LLP
 LLC
 Non-Profit 501(c)
 Other

Business Address

Address 2 (Optional)

City

State

Zip

Website

What supplemental programs does your business offer for you and/or your key employees?

Year Business Began

Industry / Purpose

Company Annual Revenue

Number of Employees

If you were selling your business today how much would you ask for it?

What are your primary short-term business objectives? (One to three years)

Owner name	% of ownership	Owner name	% of ownership
<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Owner name	% of ownership	Owner name	% of ownership
<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
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Tell us more about the people who help you run your business.

BUSINESS OWNERS

Two potential needs of many business owners are to protect dependents in the event of the owner's premature death and to build retirement savings outside the business. (Check all that apply.)

- | | |
|---|---|
| <input type="checkbox"/> The owners' dependents are not fully protected | <input type="checkbox"/> Owner's retirement distributions will be taxable |
| <input type="checkbox"/> Owner's retirement planning is incomplete | <input type="checkbox"/> This is not an area of concern |

KEY EMPLOYEES

For these purposes, a key employee is one whose contributions are significant and who would be difficult to replace. A retention plan is a compensation plan specifically designed to retain key employees. (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> The business has at least one key employee. | <input type="checkbox"/> No key person life insurance policies are in place |
| <input type="checkbox"/> There are no retention plans in place | <input type="checkbox"/> This is not an area of concern |

BUY-SELL PLANNING

A buy-sell agreement is a signed, written agreement among existing owners under which a deceased or departing owner's interest would be purchased by the business or remaining owners.

- | | |
|--|--|
| <input type="radio"/> There is no buy-sell agreement in place | <input type="radio"/> There is a fully funded agreement in place |
| <input type="radio"/> There is a partially funded agreement in place | <input type="radio"/> This is not an area of concern |

BUSINESS SUCCESSION

A business succession plan is a well-considered set of procedures and financial arrangements whereby the business will continue under new ownership or when the existing owner departs.(Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> At least one successor owner has been identified | <input type="checkbox"/> There is no succession plan in place |
| <input type="checkbox"/> Potential successors lack experience | <input type="checkbox"/> This is not an area of concern |

Notes