

## Business Facts

Business Name: \_\_\_\_\_

Owner(s): \_\_\_\_\_

- "C" Corp       "S" Corp       Sole Proprietor  
 Partnership       Limited Liability Company

Year Business Started: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

Fiscal Year End: \_\_\_\_\_ Tax Bracket: \_\_\_\_\_

## Business Succession and Estate Planning

	YES	NO	Not Sure
I have made plans to transfer the business to family members or business partners.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our Business has a formal written buy-sell agreement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My Business agreements have been reviewed within the last 24 months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our buy-sell is funded to cover death, disability and retirement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The fair market value of the business has been calculated in the last 24 months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My estate planning documents (wills/trusts) have been reviewed in the last 24 months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have estimated my total settlement costs (probate, estate tax and administration) in the last 24 months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have reduced taxes through charitable planning techniques.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My personal life insurance policies have been reviewed in the last 24 months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Risk Management

	YES	NO	Not Sure
The loss of one of more key people would cause a hardship to my business.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have key person insurance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have made plans to ensure business expenses are paid if I become too sick or hurt to work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Employee Benefits – For All Employees

	YES	NO	Not Sure
My business has a group disability plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My business has a retirement plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am satisfied with the service and investment performance on our retirement plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am satisfied with the level of benefits I will receive under my retirement plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am interested in allowing employees to pay for benefits with before-tax money.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Employee Benefits – Select Employees

	YES	NO	Not Sure
I would like to examine ways to enhance my retirement income.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I provide an additional retirement plan for select employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I believe my business is paying too much in taxes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would be interested in more information on attracting and keeping quality employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My business life insurance plans have been reviewed in the last 24 months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Contact Information:

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\_\_\_\_\_  
\_\_\_\_\_

## Discussion Priorities

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### Business Succession Planning/Estate Planning

- Buy-Sell Review
- Valuation of Business
- Estate Tax Analysis & Review
- Charitable Planning
- Life Insurance Review

### Risk Management

- Key Employee Insurance
- Disability Business Overhead Expense Insurance

### Employee Benefits – All Employees

- Disability
- Life
- Retirement

### Select Employees

- Retirement
- Survivor Benefits
- Disability Insurance
- Life Insurance
- Attracting and Keeping Quality Employees

# Business Review

“A review is more than a report card.  
It’s intelligence to help you  
protect your business.”



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