

Business Disposition

In the event of your death, do you want your business interest:

A. Retained for Family

B. Sold

C. Liquidated

A. Family Retention:

How is your business interest to be transferred?

by will (at death)

by gift (during life)

by sale (during life or at death)

Who is to receive your business interest? _____

B. Sold:

To whom will your business interest be sold? _____

Do you have a written buy-sell agreement?

Yes

No

If yes, where is the agreement kept? _____

If yes, is the plan funded with life insurance?

Yes

No

If yes, where are the policies kept? _____

C. Liquidated:

Have you made provisions to avoid a forced liquidation?

Yes

No

If yes, what plans have been made? _____
