

Business Disposition

Presented by:



Prepared for:

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?