

North American's business solutions

Key person agent worksheet

Business information

Business name: _____

Address: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Accountant: _____

Accountant phone: _____

Attorney: _____

Attorney phone: _____

Is the business value expected to change? Yes No

Details: _____

Key employee information

Name: _____

Title/Position within company: _____

Date of birth: _____

Underwriting class: _____

Planned retirement age: _____

Notes: _____

Clients do business with company because of key person: Yes No

Explain: _____

Key person has high profile in industry: Yes No

Explain: _____

Key person has important connections: Yes No

Explain: _____

Sales and operations

In a sales position, the key person is (check all that apply):

High producer Leader/motivator of sales team Personally responsible for key clients

Key person is actively involved in planning/organizing business direction and future initiatives: Yes No

Explain: _____

Specializations

Key person has rare or specialized skills/talents: Yes No

Explain: _____

Key person has deep/wide industry experience: Yes No

Explain: _____

Key person is responsible for research and development: Yes No

Explain: _____

Replacement

Key person would be difficult to replace quickly: Yes No

Explain: _____

Key person would be costly to replace: Yes No

Explain: _____

Position requires a lengthy training period: Yes No

Explain: _____

Key person current salary (including benefits/incentives):

\$ _____

Key person insurance coverage required:

\$ _____

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Administrative Office
One Sammons Plaza
Sioux Falls, South Dakota
NorthAmericanCompany.com