

# North American's business solutions

## Buy-sell client worksheet

Business name: \_\_\_\_\_

Type of business:

- C corporation
- S corporation
- Limited Liability Company (LLC)
- Partnership
- Proprietorship
- Privately owned

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Phone 2: \_\_\_\_\_

Fax: \_\_\_\_\_ Fax 2: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Accountant: \_\_\_\_\_

Accountant phone: \_\_\_\_\_

Attorney: \_\_\_\_\_

Attorney phone: \_\_\_\_\_

Approximate worth of business: \_\_\_\_\_

Total assets of business: \_\_\_\_\_

How long the buy-sell funding is needed: \_\_\_\_\_

Is the business value expected to change?  Yes  No

Details: \_\_\_\_\_

Conditions upon which buy-sell agreement will become operative: owner/shareholder information

- Death
- Disability  Yes  No
- Retirement
- Withdrawal from business
- Attempted sale or transfer
- Other \_\_\_\_\_

### Owner/shareholder information

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

Date of birth: \_\_\_\_\_

Underwriting class: \_\_\_\_\_

Percentage of business owned: \_\_\_\_\_

Planned retirement age: \_\_\_\_\_

Notes: \_\_\_\_\_

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

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

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