

North American's business solutions

Buy-sell agent checklist

- Changing value of the business and life insurance needs

Notes:

- Need for death benefit protection with the potential to grow cash value

Notes:

- Need for corresponding key person life insurance

Notes:

- Decision maker(s) in the organization

Notes:

- Are the following financed?

- Death

- Disability

- Divorce

- Bankruptcy

- Retirement

- Other _____

- Stock redemption, cross purchase, hybrid, or third party? How many owners? (If more than three owners, individual ownership of policies may not be efficient.)

Notes:

- Ownership and beneficiary designations of life insurance policies are appropriate

Notes:

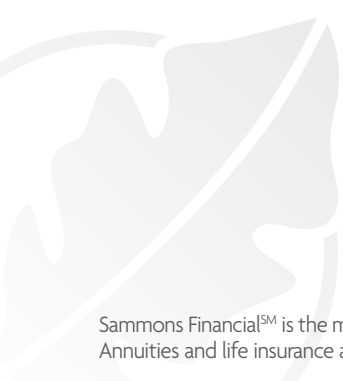
- Details of the buy-sell agreement, including the valuation formula

Notes:

- Client has drafted buy-sell agreement with attorney

- Copy attached

- Buy-sell agreement is signed and executed by all parties



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