

# North American's business solutions

## Client profile

**Name:** \_\_\_\_\_ **Agent code:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **MGA:** \_\_\_\_\_

Whether your clients own a large company or a small family-operated business, the success of any business depends on smart strategy and planning.



### A BUY-SELL LIFE INSURANCE CONCEPT FOR BUSINESS OWNERS

#### Protect your business clients from...

- Unintended or unwelcome transfers of ownership.
- Heirs being stuck with an inheritance they can't use.
- Unsecured funding of the transfer of ownership of the business.
- Potentially lengthy probate courts and lawsuits.

#### ... Funding a buy-sell agreement with life insurance can be the answer.

List the names of business owners who fit the above profile and whom you would like to help meet their life insurance needs and financial goals.

<b>Business name:</b> _____	<b>Estimated business valuation:</b> \$ _____
<b>Owner name:</b> _____	<b>Age:</b> _____ <b>Gender:</b> Tobacco:Y/N <b>State:</b> _____
<b>Percentage ownership:</b> % _____	<b>Retirement age:</b> _____

<b>Business name:</b> _____	<b>Estimated business valuation:</b> \$ _____
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