

Business Information

Business Name _____

Business Nature	<input type="checkbox"/> Agriculture, Forestry, Fishing	<input type="checkbox"/> Mining	<input type="checkbox"/> Services
	<input type="checkbox"/> Construction	<input type="checkbox"/> Public Administration	<input type="checkbox"/> Wholesale Trade
	<input type="checkbox"/> Equipment	<input type="checkbox"/> Retail Trade	<input type="checkbox"/> Other
	<input type="checkbox"/> Finance, Insurance, Real Estate	<input type="checkbox"/> Transportation, Communication, Electrical	<input type="checkbox"/> Unknown
	<input type="checkbox"/> Manufacturing		
Business Form	<input type="checkbox"/> C Corporation	<input type="checkbox"/> LLC	<input type="checkbox"/> Sole Proprietorship
	<input type="checkbox"/> S Corporation	<input type="checkbox"/> Professional Corporation (PC)	<input type="checkbox"/> Association
	<input type="checkbox"/> Private Corporation	<input type="checkbox"/> Partnership	<input type="checkbox"/> Charitable Organization
	<input type="checkbox"/> Public Corporation	<input type="checkbox"/> Limited Partnership (LP)	<input type="checkbox"/> Non-Profit Organization
	<input type="checkbox"/> Personal Service Corporation	<input type="checkbox"/> LLP	<input type="checkbox"/> Unknown

Business Value

Current Value	Business Tax Bracket	Annual Growth Rate	Years to Project Value
\$	%	%	

Owner Considered

**You may run a separate presentation for each owner considered. Funding recommendations for potential solutions can be illustrated for All Owners or only for the Owner Considered.*

First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
				%	\$	%

Business Continuation Preference

**The Preference identifies how the business interests should pass if the Owner Considered died. This will help determine which potential solutions are appropriate.*

Select One:

- _____ Sell the Business to a Co-Owner who is **NOT** a family member
- _____ Sell the Business to a Non-Owner (Employee or Third Party) who is **NOT** a family member
- _____ Sell the Business to a Co-Owner who **IS** a family member
- _____ Sell the Business to a Non-Owner (Employee or Third Party) who **IS** a family member
- _____ Liquidate the Business: Shrinkage Due to Liquidation*: _____%

**When a business is liquidated, only the assets can be sold; owners cannot sell goodwill or the ongoing value of the business. Therefore, there is a certain amount of shrinkage. Also, those assets that are used when sold must be sold for less than their full value. The number in this field represents an estimated percentage of all shrinkage that occurs.*

Other Owners

**If the "% Owned" for the Other Owners do not add up to 100%, the software will not illustrate the remaining portion of the business in the solution and recommendations.*

Would you like to illustrate the continuation solution and funding recommendations for the "Other Owners"?

YES NO

Owner 2	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 3	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 4	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 5	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 6	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 7	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 8	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 9	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 10	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 11	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 12	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 13	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 14	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket
Owner 15	<u> </u>	<u> </u>	<u> </u>	<u> </u>	%	\$	%
	First Name	Last Name	Birth Date	Position	% Owned	Cost Basis	Tax Bracket