



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:

- Death
- Disability
- Retirement
- Withdrawal from business
- Attempted sale or transfer
- Other _____

Owner/Shareholder Information

Name: _____

Date of birth: _____

Underwriting class: _____

% of business owned: _____

Planned retirement age: _____

Notes: _____

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