



North American's Business Solutions

Buy-Sell Agent Checklist

Discussed changing value of the business and life insurance needs Notes:
Considered a supplemental cash value growth plan along with life coverage Notes:
Determined need for corresponding key person life insurance Notes:
Identified the decision maker in the organization Notes:
Triggers have been discussed and the following are 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:
Verified ownership and beneficiary designations of life policies are appropriate Notes:
Obtained details of the agreement, including the valuation formula Notes:
Client has drafted plan with attorney
□ Copy attached
Plan is signed and executed by all parties