



# 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 \_\_\_\_\_

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Owner/Shareholder Information

Name: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Underwriting class: \_\_\_\_\_

% of business owned: \_\_\_\_\_

Planned retirement age: \_\_\_\_\_

Notes: \_\_\_\_\_

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\_\_\_\_\_  
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\_\_\_\_\_

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