



# Established Business Discovery Form

Let's determine your current situation to support your goals. Please read through and answer all 12 statements.

1. I have financial control of my business without the restrictive influence of my bankers or investors.  
Yes  No  Unsure  Does Not Apply
2. I have ensured that the loss of specific key employees due to death or disability will not adversely affect profits or business credit.  
Yes  No  Unsure  Does Not Apply
3. I have programs in place to retain key employees who are the key to the success of the business.  
Yes  No  Unsure  Does Not Apply
4. In the event of my premature death or extended disability the business could manage without difficulty.  
Yes  No  Unsure  Does Not Apply
5. We have a written strategy for managing the business in the event of my death or disability.  
Yes  No  Unsure  Does Not Apply
6. My spouse/partner plays a critical role in the success of my business.  
Yes  No  Unsure  Does Not Apply
7. My spouse/partner has a clear understanding of my business continuation plan.  
Yes  No  Unsure  Does Not Apply
8. I have a formal and updated buy/sell agreement that clearly outlines the conditions that each shareholder may sell their interests should one become disabled, retire, die or simply choose to sell.  
Yes  No  Unsure  Does Not Apply
9. I know the fair market value of my business.  
Yes  No  Unsure  Does Not Apply
10. In my opinion, our business provides adequate compensation for the owners.  
Yes  No  Unsure  Does Not Apply
11. I know what the tax implications are regarding my estate (combined business and personal) - and if my family would be forced to sell assets or the business to pay for the taxes.  
Yes  No  Unsure  Does Not Apply
12. I feel the company will be a main source of my retirement income.  
Yes  No  Unsure  Does Not Apply

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