



Developing Business Discovery Form

Let's determine your current situation to support your goals. Please read through and answer all 11 statements.

1. My business would survive if I were not physically present to run and oversee the daily business activities.
Yes No Unsure Does Not Apply
2. My business is the primary income source for maintaining my family's lifestyle.
Yes No Unsure Does Not Apply
3. My business is ready for others either to manage or buy should I leave due to disability, sickness or death.
Yes No Unsure Does Not Apply
4. My current standard of living would continue if I was unable to work due to accident or illness.
Yes No Unsure Does Not Apply
5. The full market value of my business will be transferred to my heirs in the event of death.
Yes No Unsure Does Not Apply
6. I have ensured that the loss of specific key employees would not adversely affect profits or business credit.
Yes No Unsure Does Not Apply
7. I feel the company will be my main source of my retirement income.
Yes No Unsure Does Not Apply
8. My will is current and consistent with my business plans.
Yes No Unsure Does Not Apply
9. All business loans and personal guarantees will be paid off in the event of my death.
Yes No Unsure Does Not Apply
10. I would like to understand how an employee benefit plan would contribute to my business.
Yes No Unsure Does Not Apply
11. I have a formal buy/sell shareholders agreement that clearly outlines the conditions under which each shareholder may sell his/her interests should he/she become disabled, retired, die or simply choose to sell.
Yes No Unsure Does Not Apply

Barrie Office
39 Collier St.
Barrie ON L4M 1G5
Tel 705-726-3350

Dunnville Office
212 Maple St.
Dunnville ON N1A 1G4
Tel 905-701-1346


BARNETT
WEALTH MANAGEMENT
FINANCIAL SERVICES & EMPLOYEE BENEFITS
www.barnettwealth.com