Buy-Sell Planning Factfinder

Name of Business: _____

Address: _____

Type of Entity: ☐ C Corporation ☐ S Corporation ☐ LLC ☐ Partnership
☐ Limited Partnership ☐ Sole Proprietorship

Year Organized: _____

Nature of Business or Profession: _____

Earnings (net before taxes, last 4 years): 200___$_____
200___$_____
200___$_____
200___$_____

Entity Tax Bracket: _____ %

Tax Payer Information: ☐ Cash basis ☐ Accrual basis ☐ Tax Year other than Calendar

Business Owners:

Name	Ownership Percent	Date of Birth	Smoker/Non Smoker	Sex	State of Residence	Family Member

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Method of Valuing Business:

☐ **Appraisal** Value Amount: _____

☐ **Book Value** Net Assets: _____
Liabilities: _____
Multiple % _____

☐ **Goodwill** Value Amount: _____

☐ **Capitalization of Earnings** Schedule of Earnings: _____
_____
_____
_____

Use weighted average? ☐ Yes ☐ No
Fiscal Year: _____
Amount: _____
Multiple % _____
Capitalization Rate% _____

☐ **Owners' Estimate:** _____

☐ **Apply assumed increase per year?** ☐ Yes ☐ No

Rate: _____ %

Existing Buy-Sell Arrangement:

Type of Arrangement: ☐ Entity purchase ☐ Cross-purchase ☐ Wait-and-See
☐ No sell buy-sell ☐ Trusteed cross-purchase
☐ Other: _____

Parties: _____

Date of agreement: _____

Events triggering buyout: ☐ Death ☐ Disability ☐ Retirement
☐ Bankruptcy
☐ Other: _____

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