



Key Person

Business Information

Name _____

Nature			
<input type="checkbox"/>	Agriculture, Forestry and Fishing	<input type="checkbox"/>	Public Administration and Non-Classifiable
<input type="checkbox"/>	Construction	<input type="checkbox"/>	Retail Trade
<input type="checkbox"/>	Equipment	<input type="checkbox"/>	Services
<input type="checkbox"/>	Finance, Insurance and Real Estate	<input type="checkbox"/>	Transportation, Communication and Electric
<input type="checkbox"/>	Manufacturing	<input type="checkbox"/>	Unknown
<input type="checkbox"/>	Mining	<input type="checkbox"/>	Wholesale Trade
<input type="checkbox"/>	Other		

(The information in this field will not be used for any analytical purposes, but will appear in the presentation.)

Form					
<input type="checkbox"/>	Association	<input type="checkbox"/>	Non-Profit Organization (NPO)	<input type="checkbox"/>	S Corporation
<input type="checkbox"/>	C Corporation	<input type="checkbox"/>	Partnership	<input type="checkbox"/>	Sole Proprietorship
<input type="checkbox"/>	Charitable Organization	<input type="checkbox"/>	Personal Service Corporation	<input type="checkbox"/>	Unknown
<input type="checkbox"/>	Limited Liability Company (LLC)	<input type="checkbox"/>	Private Corporation		
<input type="checkbox"/>	Limited Liability Partnership (LLP)	<input type="checkbox"/>	Professional Corporation		
<input type="checkbox"/>	Limited Partnership (LP)	<input type="checkbox"/>	Public Corporation		

(Some solutions will not be available for some forms of business. In addition, this information will be included in the presentation so that legal and tax advisors can take into account the way the form of business affects taxation and precludes certain business solutions.)

Corporate Tax Bracket _____ % (The corporate tax bracket should be the marginal tax bracket at which to estimate the last corporate dollar being taxed.)

Annual Growth Rate _____ % (This number should represent the percentage of the average annual earnings. It will be used to reflect the growth rate for the immediate future.)

Annual Sales \$ _____

Value \$ _____

Key Persons

Key Person 1	
Name (First/Last)	Birthdate
_____	_____
Business Title	

Business share _____ %	Years to Retirement _____
Cost Basis \$ _____	Tax Bracket _____ %
Impact of Key Person	
Portion of Profits _____ %	
Portion of Sales _____ %	1-10 (1 = not a factor, 10 = major factor)
Unique Qualities _____	1-10 (1 = not a factor, 10 = major factor)
Employee Relationships _____	1-10 (1 = not a factor, 10 = major factor)
Business Continuation _____	1-10 (1 = not a factor, 10 = major factor)
Company Credit _____	1-10 (1 = not a factor, 10 = major factor)
Monies Owed to Key Person _____	1-10 (1 = none, 10 = significant amount)
Documentation of Duties _____	1-10 (1 = completely, 10 = not documented)
Survivor's Expectations _____	1-10 (1 = none, 10 = high expectations)
Business Interest _____	1-10 (1 = fully funded agreement, 10 = no plans)

Value of Key Person

Annual Salary \$ _____

Years to train replacement _____

Future Value

Years to project _____ (Allows you to use funding options based on the future value of the business)

Funding with Life Insurance

Initial face amount \$ _____

Initial annual premium \$ _____

Years to Pay _____

Key Person 2

Name (First/Last) _____ Birthdate _____

Business Title _____

Business share _____ % Years to Retirement _____

Cost Basis \$ _____ Tax Bracket _____ %

Impact of Key Person

Portion of Profits	_____ %	
Portion of Sales	_____ %	1-10 (1 = not a factor, 10 = major factor)
Unique Qualities	_____	1-10 (1 = not a factor, 10 = major factor)
Employee Relationships	_____	1-10 (1 = not a factor, 10 = major factor)
Business Continuation	_____	1-10 (1 = not a factor, 10 = major factor)
Company Credit	_____	1-10 (1 = not a factor, 10 = major factor)
Monies Owed to Key Person	_____	1-10 (1 = none, 10 = significant amount)
Documentation of Duties	_____	1-10 (1 = completely, 10 = not documented)
Survivor's Expectations	_____	1-10 (1 = none, 10 = high expectations)
Business Interest	_____	1-10 (1 = fully funded agreement, 10 = no plans)

Value of Key Person

Annual Salary \$ _____ Years to train replacement _____

Future Value

Years to project _____ (Allows you to use funding options based on the future value of the business)

Funding with Life Insurance

Initial face amount \$ _____
Initial annual premium \$ _____
Years to Pay _____

Key Person 3

Name (First/Last) _____ Birthdate _____

Business Title _____

Business share _____ % Years to Retirement _____

Cost Basis \$ _____ Tax Bracket _____ %

Impact of Key Person

Portion of Profits	_____ %	
Portion of Sales	_____ %	1-10 (1 = not a factor, 10 = major factor)
Unique Qualities	_____	1-10 (1 = not a factor, 10 = major factor)
Employee Relationships	_____	1-10 (1 = not a factor, 10 = major factor)
Business Continuation	_____	1-10 (1 = not a factor, 10 = major factor)
Company Credit	_____	1-10 (1 = not a factor, 10 = major factor)
Monies Owed to Key Person	_____	1-10 (1 = none, 10 = significant amount)
Documentation of Duties	_____	1-10 (1 = completely, 10 = not documented)
Survivor's Expectations	_____	1-10 (1 = none, 10 = high expectations)
Business Interest	_____	1-10 (1 = fully funded agreement, 10 = no plans)

Value of Key Person

Annual Salary \$ _____

Years to train replacement _____

Future Value

Years to project _____ (Allows you to use funding options based on the future value of the business)

Funding with Life Insurance

Initial face amount \$ _____

Initial annual premium \$ _____

Years to Pay _____

Key Person 4

Name (First/Last) _____ Birthdate _____

Business Title _____

Business share _____ % Years to Retirement _____

Cost Basis \$ _____ Tax Bracket _____ %

Impact of Key Person

Portion of Profits	_____ %	
Portion of Sales	_____ %	1-10 (1 = not a factor, 10 = major factor)
Unique Qualities	_____	1-10 (1 = not a factor, 10 = major factor)
Employee Relationships	_____	1-10 (1 = not a factor, 10 = major factor)
Business Continuation	_____	1-10 (1 = not a factor, 10 = major factor)
Company Credit	_____	1-10 (1 = not a factor, 10 = major factor)
Monies Owed to Key Person	_____	1-10 (1 = none, 10 = significant amount)
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Value of Key Person

Annual Salary \$ _____ Years to train replacement _____

Future Value

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Funding with Life Insurance

Initial face amount \$ _____
Initial annual premium \$ _____
Years to Pay _____

