

## Business Disposition

**In the event of your death, do you want your business interest:**

**A.** Retained for Family

**B.** Sold

**C.** Liquidated

**A. Family Retention:**

How is your business interest to be transferred?

by will (at death)

by gift (during life)

by sale (during life or at death)

Who is to receive your business interest?

**B. Sold:**

To whom will your business interest be sold?

Do you have a written buy-sell agreement?

Yes

No

If yes, where is the agreement kept?

If yes, is the plan funded with life insurance?

Yes

No

If yes, where are the policies kept?

**C. Liquidated:**

Have you made provisions to avoid a forced liquidation?

Yes

No

If yes, what plans have been made?