## **Business Disposition**

Presented by: Your Financial Advisor

Prepared for:

)	A. Retained for Family B.	Sold C. Liquidated
	Family Retention:	
	How is your business interest to be transferred?  Who is to receive your business interest?	<ul><li>by will (at death)</li><li>by gift (during life)</li><li>by sale (during life or at death)</li></ul>
	Sold:	
	To whom will your business interest be solo  Do you have a written buy-sell	d? ○ Yes
	agreement?	O 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?	
	Liquidated:	
	Have you made provisions to avoid a forced liquidation?  If yes, what plans have been made?	O Yes O No

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