

# Business Disposition

Presented by: Your Financial Advisor

Prepared for:

## 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?