

Business Indicators Fact Finder



General Business Information

Business Name	
Type of Business	
Business Address	
Website(s)	
Number of Employees	

Form of Business

How is the business organized?

<input type="checkbox"/> Sole Proprietorship	<input type="checkbox"/> C Corporation	<input type="checkbox"/> Limited Liability Company
<input type="checkbox"/> Partnership	<input type="checkbox"/> Professional Corporation	<input type="checkbox"/> Limited Partnership
<input type="checkbox"/> S Corporation	<input type="checkbox"/> Non-Profit	<input type="checkbox"/> Limited Liability Partnership

When did you establish the business?

Where did you establish the business? (In what state?)

For corporations:	When was the business incorporated?	
	What is the corporate tax bracket?	

Ownership

Who are the owners of the business?

	Owner	Owner	Owner
Name			
Relationship			
Title/Function			
Percentage Owned			
Age			

Advisors

Who is your CPA?

Who is your banker?

Who is your financial planner
or investment manager?

Who is your attorney?

Who is your insurance agent?

What other advisors do you
work with?

Business Background and Goals

How did the business get started?

How are things going with the business?

What are your major business concerns? (What keeps you awake at night?)

Where do you expect your business to be in 5 years? 10 years? (What is your greatest wish for your business?)

What employees are critical to running the business daily? Are any of these employees family members?

Business Valuation

Do you know the value of your business today?

When was the last time you had a valuation done on your business?

If you were going to buy the business today, what would you pay for it?

If you were going to sell the business today, what would you sell it for?

What business value would you want to use for planning purposes?

What is your exit strategy for the business? What family issues may affect your exit plan?

Business Background and Goals

What are your thoughts about retirement?

Are you counting on your business to fund your retirement?

Have you coordinated your business and retirement plans with an estate plan?

What areas of your retirement do you feel should be addressed?

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**SMALL BUSINESS OWNER
MARKETING PROGRAM** 

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