



# Business Fact Finder

BUILDING THE RELATIONSHIP

Products issued by

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# Information About You and Your Business

Business information	Name	
	Website	
Your information	Name	
	Email	
	Ownership %	
If not sole owner, total number of owners		

How did you get started in your business?

What makes your business different from your competitors?

What is your strategic vision for your company?

What challenges do you anticipate in the next 3 to 5 years?

Tell me about the key employees who are critical to the success of your business.

# Information About You and Your Business

How would your business be impacted if an owner or a key employee left your company?

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Is there anything else you believe is important for me to know at this time?

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Notes

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# Prioritizing Your Goals

Ten common business owner goals are listed below. Please identify your top three priorities for the next 1 to 3 years.

For your <b>business</b>	<input type="checkbox"/> Covering any business debt I have personally guaranteed.
	<input type="checkbox"/> Protecting the business in the event of a key employee's departure or death.
For you and the other business <b>owners</b>	<input type="checkbox"/> Protecting my family's income in the event of my death.
	<input type="checkbox"/> Receiving tax-efficient benefits paid with company dollars.
	<input type="checkbox"/> Efficiently transferring my business interest in the event of my disability, retirement, or death.
	<input type="checkbox"/> Receiving a fair price for my business interest.
For your <b>key employees</b>	<input type="checkbox"/> Equitably distributing assets to my children who are not involved in the business.
	<input type="checkbox"/> Rewarding and retaining my key employees by providing them tax-efficient benefits.
	<input type="checkbox"/> Protecting my key employees' income in the event of their death.
For <b>all employees</b>	<input type="checkbox"/> Providing a qualified retirement plan.

**Notes:**

**Date of Initial Discussion:**

**Dates of Review:**

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