

Employer Fact Finder



**American
General**
Life Companies

Business owners often are too busy to give much thought to planning for their business in the event of their death, disability, retirement, or other unforeseen event. This brief discussion guide can help you focus your meeting on what needs the business owner may have and how you can assist in the planning process—for the future of the business owner, business, and employees.

Company Overview

Business owner _____

Business name _____ Nature of business _____

Address _____ State/Zip code _____

Telephone _____ FAX _____

Contact e-mail _____ Business Web site _____

What is the legal form of business? Sole proprietorship Partnership LLP LLC S Corp. C Corp.

Current tax bracket? _____ Number of owners/shareholders? _____

Are owners related? Yes No Indicate family relationships _____

Number of years in business? _____ When does owner plan to retire? _____

What are the business' goals – short term and long term? _____

Upon retirement, will the business be: Retained Sold Liquidated

If the business is retained, who would manage it? Spouse Child Key employee Other

If the business is sold, who will buy the business? Key employee Family member Third party

If the business was being sold today, what would be the asking price? _____

Is there a buy-sell agreement in place? Yes No Is it funded? Yes No

How is it funded? _____

What is the agreed-upon sale price? _____

How was the valuation determined? _____

What is the source of retirement income? Pension Personal savings Sale of business Have not thought about it

Percent of owner's total estate made up by the business? _____

In the event of the owner's premature death, what would happen to the business? _____

Is there a business succession plan should the owner become disabled? _____

If so, what is it? _____

Will the owner's salary be continued? Yes No How much? _____ How long? _____

Today, what concerns the business owner the most about the business? _____

Policies issued by:

American General Life Insurance Company

2727-A Allen Parkway, Houston, TX 77019

**The United States Life Insurance Company
in the City of New York**

One World Financial Center, 200 Liberty Street, New York, NY 10281

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