



1. Business name: \_\_\_\_\_

1a. Owner(s) name: \_\_\_\_\_

\_\_\_\_\_

1b. Children of owners: Number in business \_\_\_\_\_

Outside of business \_\_\_\_\_

1c. Nature of your business: \_\_\_\_\_

1d. Headquarters – City, State: \_\_\_\_\_

1e. Issue state: \_\_\_\_\_

2. Type of business entity and tax status:

Corporation

Taxed as: C corporation S corporation

LLC

Taxed as: Partnership C Corporation

S corporation

Partnership

Sole proprietorship\*

3. Total number of employees: 1-9, 10-50, 51-200, 201-500, 501+

4. Number of business owners: 1 2 3 4+

5. Years the business has been operating? \_\_\_\_\_

6. Annual growth rate: \_\_\_\_\_%

7. Business tax rate (Enter owner's tax rate if business is taxed as a flow-through organization.): \_\_\_\_\_%

8. Do you have a buy-sell agreement? Yes No



If yes, provide a copy of the agreement.

9. If there is no written buy-sell agreement, to whom do you intend to sell to? Family Key employee

Third party Co-owner

10. Names of the following professional advisers:

Attorney: \_\_\_\_\_

Accountant: \_\_\_\_\_

Banker: \_\_\_\_\_

11. Attach three full years of income statements and balance sheets, or three full years of company tax returns.

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