

# Business Succession Planning Worksheet

*The following are questions to consider in creating a succession plan for business ownership.  
Fill out this form and submit it to The Business Planning Group for further evaluation.*

**Legal Name of Company** \_\_\_\_\_  
**Doing Business As** \_\_\_\_\_  
**Primary Business Activity** \_\_\_\_\_  
**Type of Business Entity** \_\_\_\_\_

## What issues would you like to address in your business succession plan?

- Plan for Retirement (give details) \_\_\_\_\_  
\_\_\_\_\_
- Transfer Ownership From / To \_\_\_\_\_
- Sell Business To:  
     Family: \_\_\_\_\_      Employees: \_\_\_\_\_      Others: \_\_\_\_\_  
     Target Sale Date? \_\_\_\_\_
- Plan for the survival of the business in the event of the death of \_\_\_\_\_
- Other \_\_\_\_\_

## Company Statistics

How many employees do you have? \_\_\_\_\_  
 What were your annual sales last year? \_\_\_\_\_  
 Value for Estate Tax Purposes \_\_\_\_\_  
 Who is capable of running the business? \_\_\_\_\_  
 Does the business have uninsured obligations? \_\_\_\_\_

Who are the owners of the company and their level of involvement?

Owner(s)	% Ownership or Shares	Age	Active(Y/N)	Relationship
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## Contact Information

Name & Title: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Email: \_\_\_\_\_