

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: _____