Estate planning for business owners

Use this sheet to prepare a conversation with your appropriately qualified professionals. Write down the decision you want to make and what information is still missing.

01 Who could act for me, and what authority would each person actually have?

02 Do business agreements permit the transfers described in my estate documents?

03 How would the family and company obtain cash during the transition?

04 How should ownership, management and benefits be divided among family members?

05 Which changes should trigger another legal, tax and financial review?

LEAVE WITH AN AGREED NEXT STEP

Decision / information needed: _____

Person responsible: _____ Review date: _____

General education only. This is not individualized investment, tax, legal or insurance advice. No advisor relationship or introduction is created by using this sheet. Confirm the scope and responsibilities with each professional.