

THE LAW OFFICES OF LACI D. JONES, PC

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BUSINESS BUY-SELL CONFIDENTIAL QUESTIONNAIRE

BUSINESS OWNER DATA

FULL NAME _____
Last First Middle

ADDRESS: _____
Number Street City State Zip Code

OWNERSHIP INTEREST: _____

FULL NAME _____
Last First Middle

ADDRESS: _____
Number Street City State Zip Code

OWNERSHIP INTEREST: _____

BUSINESS ENTITY DATA

NAME

TYPE

DATE OF FORMATION

ADDRESS:

Number Street City State Zip Code

BUSINESS PLANNING OBJECTIVES

GENERAL OBJECTIVES:

GUIDELINE OBJECTIVES:

General Restriction of Ownership Interest Transfers

Voluntary Transfers to Third Parties of Ownership Interest

Internal Transfers of Ownership Interest

Transfers upon Termination for Cause

Transfers upon Disability or Voluntary Termination

Transfers upon Death of an Owner

Involuntary Transfers During Lifetime

AGREEMENT PRICE:

How Computed During Lifetime Transfers

How Computed During for Transfers Upon Death

AGREEMENT TERMS:

Type of Payment

Documentation of Transfers

LIFE INSURANCE:

Existence of Policies

Purpose for Designated Life Insurance Policy Benefits

Added Policies

RESTRICTIONS AGAINST:

Competition

Solicitation

Servicing

Revealing Confidential Information

(Covenant Not to Compete or Solicit, Covenant of Confidentiality, Enforcement)

Are there any special items you would like to have incorporated in your business plan not outlined above?