



BUSINESS PLAN

1. Name of business: _____
2. Address of business: _____
3. Year business began: _____ If corporation, when did it incorporate: _____
4. Fiscal year end: _____ # of employees: _____
5. What type of construction does your firm do: _____

6. What is your position and what are your functions: _____

7. Do your management or succession plans include:
 - A. Family member participation: Yes No
 - B. Buy/sell agreement in effect: Yes No
Name/position of employee(s) involved:
1. _____ 2. _____
3. _____ 4. _____
 - C. How is the buy/sell agreement funded, and for how much:

 - D. Employment contract: Yes No
Name/position of employee(s) involved:
1. _____ 2. _____
3. _____ 4. _____
8. In the event of your injury or death, who will run your company: _____
9. Is there key man life insurance on you payable to the company to finance the completion of all outstanding work you have under contract: Yes No
If yes, what is the amount of life insurance: _____
10. What will happen to your business when you retire: _____

