

Business Worksheet (Optional)

Do you have a business plan? **Yes** **No**

Do you have an entity in place (LLC, S-Corp, etc.)? **Yes** **No**

Do you have an accountant? **Yes** **No**

Do you use Quickbooks? **Yes** **No**

Do you have a current profit loss statement? **Yes** **No**

Are your taxes up to date? **Yes** **No**

Do you do your own payroll? **Yes** **No**

Do you have key person insurance? **Yes** **No**

Do you provide benefits to your employees? **Yes** **No**

Do you have employee retention issues? **Yes** **No**

Do you wish to retain a higher percentage of all qualified retirement contributions? **Yes** **No**

Do you have a buy-sell agreement in place? **Yes** **No**

Are you currently profitable? **Yes** **No**

Please describe any other business concerns below:

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