

ADVANTAGE PATHWAY™ QUESTIONNAIRE
Limited Liability Companies and Corporations

I. Owner #1 Information:

A. Name: _____

B. Address: _____

C. Phone: _____

D. Personal Attorney: _____

E. Spouse's Name: _____

II. Owner #2 Information:

A. Name: _____

B. Address: _____

C. Phone: _____

D. Personal Attorney: _____

E. Spouse's Name: _____

NOTE: If there are additional owners, please include the same information for them on the back of this page.

III. Company Information:

A. Company Name: _____

B. Company Address: _____

C. Type of Entity: Corporation LLC Partnership

D. Briefly describe the company's business activities:

F. Name and address of the company's accountant: _____

H. Name and address of the company's insurance agent: _____

IV. Succession Plan:

A. Company's approximate value: _____

B. Describe how the value was determined: _____

C. Which of the following issues should trigger an owner's exit or buy-out:

- Death Divorce Voluntary Withdrawal/Retirement
Disability/Incapacity Financial Trouble/Bankruptcy
Other: _____

D. Will the owners purchase insurance to fund the buy-out at death or disability? _____