



Condensed Business Fact Finder

Agent Information

Agent Name: _____ PC: _____
Office Address: _____
City: _____ State: _____ Zip: _____
Phone: (_____) _____ - _____ Fax No.: (_____) _____ - _____
e-mail address: _____

Primary Information

Business Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Interviewee: _____ Position: _____

Legal Information

Business Organization Type:

- Corporation Partnership Sole Proprietorship Non-profit
 Sub-Charter Professional Limited Liability Corporation

How is the company taxed? C-Corp Partnership

Attorney: _____ Attorney Location: _____

Accountant: _____ Accountant location: _____

Business Succession

In the event of retirement, death, disability:

Have arrangements been made for who should control the business? Yes No

Do you have a plan to help with estate taxes and fees? Yes No

If you were to sell the business, what would the asking price be? \$ _____

To whom would you sell the business? _____

Business Financial Data

Approximate business Net worth: \$ _____

Annual before tax earnings: \$ _____ 5-year average \$ _____

Federal Tax Bracket: _____ % State Tax Bracket: _____ %

Business Financial Data

Number of Owners: _____ Are any of them related? Yes No

Which owners are related? _____

Do any of the owners have a personal liability in the company? Yes No

Number of employees: _____ How many are key employees? _____

Insured Owner / Key Employees?

Insured: _____ Male Female

DOB: _____ State of Residence: _____ Status: Smoker Non-Smoker

Insurance Rating¹: Preferred Plus Standard Plus Standard Table Rated _____

Is the employee an owner? Yes No Related to an owner? Yes No

If so, who? _____

Needs, Goals and Strategies

What are the company's fears and concerns regarding the future of their business?

What are their primary goals for the business?

How do they plan to achieve these goals?

What is the financial range of what they are willing to contribute to achieve these goals?

What would you, as the agent, like to be able to illustrate to the clients and business?

¹ Insurance Rating is assumed for illustration purposes only. All ratings are subject to underwriting approval.



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Neither American National nor its agents provide legal or tax advice. Clients should contact their attorney or tax advisor for their specific situation.