



# **ESTATE & BUSINESS LAW GROUP<sup>PC</sup>**

## **BUSINESS PLANNER**

The purpose of this Business Planner is to help you prepare for a consultation with one of our attorneys regarding your current business, or the formation of a new business, and to provide us with important information related to the ownership, structure and operations of your business so that we are able to provide you will appropriate solutions.

If you have any questions, please call our Client Services Director, Mary, at (847) 367-4460.

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# BUSINESS INFORMATION

Choose One:  Existing Entity  Entity to be Created

Business Name: \_\_\_\_\_  
 Doing Business As: \_\_\_\_\_  
 Business Address: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
 Primary contact: \_\_\_\_\_  
 Alternate contact: \_\_\_\_\_

<b>Type:</b> <input type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other: _____	<b>Ownership:</b> <input type="checkbox"/> S1 <input type="checkbox"/> S2 <input type="checkbox"/> Joint (S1&S2) <input type="checkbox"/> Joint (Other) <input type="checkbox"/> Trust <input type="checkbox"/> Business	Date of Filing: _____ State of Filing: _____ Percentage Owned: _____ # of Owners: _____ Est. Value: _____
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**Ownership:** Please list the current owners and ownership interest. Please list owner's legal name. If owner is an entity or Trust list date established and name and title of person authorized to sign

Name	Ownership %

**Advisors:**

Accountant: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Insurance agent: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Other business advisor: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Other business advisor: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Other business advisor: \_\_\_\_\_ Phone: \_\_\_\_\_

**My business is:**  
 manufacturing  distributor  wholesaler  service  holding co.  
 Industry: \_\_\_\_\_  
 Special licenses: \_\_\_\_\_  
 Describe business: \_\_\_\_\_

**My business' market:**  
 Biggest Competitor: \_\_\_\_\_ Greatest Strength: \_\_\_\_\_  
 Greatest Weakness: \_\_\_\_\_ Biggest Opportunities: \_\_\_\_\_  
 Biggest Threat: \_\_\_\_\_

**My business finances:**

Avg. Revenue \$\_\_\_\_\_ Avg. Expenses \$\_\_\_\_\_ Assets \$\_\_\_\_\_ Debt: \$\_\_\_\_\_  
Debt:  Line of Credit  SBA loan  Alternative Financing/Private Equity

**My business taxes are:**

Too high.  Way too high. Do you engage in planning to lower taxes?  Yes  No

**I am concerned about:**

- Being sued
- Losing business
- Going out of business
- Growing too fast
- Not growing enough
- Cash flow
- Contingency Planning
- Quality workforce
- Political uncertainty
- Regulations
- Succession Planning

**If I left for 2 weeks, my business would:**

maintain itself  suffer  thrive Why?: \_\_\_\_\_

**If I left for 2 months, my business would:**

maintain itself  suffer  thrive Why?: \_\_\_\_\_

**My business has (check all that apply):**

- A Buy/Sell Agreement
- A Shareholder's Agreement
- An Operating Agreement
- A Partnership Agreement
- Disagreements between owners
- Key Employees
- Employment Agreements
- Employee Handbook
- Non-Compete Agreements
- Employment discrimination concerns
- Employee Health Insurance
- Employee 401(k)/profit sharing
- Supply agreements w/ customers
- Long term supply agreements w/ customers
- Purchase agreements with suppliers
- Long term supply agreements
- Logos
- Inventions
- Copyright/Trademark Materials

**Business Administration**

When was your last business meeting? \_\_\_\_\_  
What is the date of your last written minutes of business meetings? \_\_\_\_\_  
Who regularly updates your business records and files your periodic reports? \_\_\_\_\_

**Substantial assets owned by my business:**

**Other Information** – Please let us know of any other information that will allow us to better help your business:

**Business Documents: Please attach any of the following that you may have:**

- Operating Agreement, Shareholder Agreement, Partnership Agreements
- Buy-Sell Agreements
- Minutes of Manager/Director meetings for last five years
- Minutes of Member/Shareholder/Partner meetings for last five years
- Manager/Director Resolutions for the last five years
- Member/Shareholder/Partner Resolutions for the last five years
- Asset list and ownership documents
- Tax returns for last two years
- Most current profit and loss statement or balance sheet
- Management structure

**Confidentiality & Attorney-Client Relationship:** All information submitted to the Estate & Business Law Group, PC will be kept confidential, regardless of whether you engage us to prepare your estate plan or not. The completion of this Personal Information–Legacy Planning Guide and its submission to the Estate & Business Law Group, PC, however, does not create an attorney-client relationship. An attorney-client relationship will only be established upon the execution of a fee agreement by you and the Estate & Business Law Group, PC for the provision of estate and/or planning services.