Fact Finder: Buy-Sell Design

Business Entity Information	
Entity Name:	
State of Domicile:	Income Tax Bracket:
Business Entity Type	
☐ C-Corporation	☐ Partnership or LLC Taxed as a Partnership
☐ S-Corporation	☐ Unknown
Business Value for Buy-Sell Agreement:	
Buy-Sell Method	
☐ Entity Redemption	☐ Cross-Purchase
☐ Cross-Endorsement	☐ Partnership
☐ One-Way (Indicate ☐ Key Person ☐ Family Member ☐ Third Party)	
Insurance Funding	
☐ Personal A/T Dollars:	☐ **162 Bonus:** ☐ Single ☐ Double
☐ **Split Dollar:** ☐ Table 2001 ☐Carrier Alternative Term Rates	**Cross-Endorsement:** ☐ Policy Owned Personally ☐ Policy Owned by Insured's ILIT
Proposed Life Insurance Design	
Product: ☐ Universal Life (UL) ☐ Indexed UL ☐ Variable UL ☐ Whole Life ☐ Term (Duration) ______________________________	☐ Carrier Preference ______________________________ ☐ Specified Product ______________________________ ☐ Illustration Attached
Death Benefit Option: ☐ Level ☐ Option B (Increasing) ☐ Return of Premium	**Return of Premium Options:** ☐ ___ Years, Return to Initial Death Benefit ☐ ___ Years, No Reduction ☐ ___ All Years
Funding (Annual): ☐ Level Pay ☐ Pay ____Years ☐ Pay to Age _____ ☐ Pay to NRA _____	

Existing Life Insurance

Product:

☐Universal Life (UL) ☐Indexed UL

☐ Variable UL ☐ Whole Life

☐Term (Duration) ____________________

☐ Issuing Carrier ____________________

☐ Policy Number ____________________

☐ In-Force Illustration Attached

Death Benefit Option:

☐ Level

☐ Option B (Increasing)

☐ Return of Premium

Return of Premium Options:

☐ ___ Years, Return to Initial Death Benefit

☐ ___ Years, No Reduction

☐ ___ All Years

Name	DOB	M/F	S/N	NRA	UW Class	State	% Ownership

Contact Information

Agent's Name

Firm Contact Name

Company Name: ____________________

Company Website: ____________________

Contact Email: ____________________

Contact Phone # ____________________

Firm Address: ____________________

____

City ____________________

State ____________ ZIP ____________

Firm Phone #: ____________________

Firm Fax #: ____________________

Agent Email: ____________________

Notes

BUSINESS PLANNING — AND A WHOLE LOT MORE

PartnersFinancial is a national community of industry-leading, independent life insurance and financial professionals. For more than **30** years, the organization has supported its members as they build insurance industry knowledge and expertise. In the process, PartnersFinancial members created a powerful culture of idea-sharing and collaboration — all for the benefit of their clients.

PartnersFinancial members take advantage of the organization's preferred market access and clout to offer clients a comprehensive selection of high-quality insurance and wealth transfer solutions. Members also have access to an extensive range of resources, technology, tools, and knowledge-sharing forums and events. A division of NFP, PartnersFinancial also offers members access to capabilities that go beyond an individual company's scope.

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