

Research is the best way to assess the unique needs of small business owners. Begin by doing a little leg work to find out about your client and their business. Complete this fact-finder as you research, then use it as a guide to gather other key information during your conversation.

Business name

Business owner's name

Business type

- Sole proprietorship Partnership
 C corporation S corporation
 Farmer/rancher

Other owners

- 0 1 2 3 3+

Number of employees

Number of key employees

Years in business

Buy/sell agreement in place?

- Yes No

Retirement plan in place?

- Yes No

Earnings history

Yearly income

Gross earnings before taxes

Gross sales

After-tax net profits

Bottom line

Total assets

Total assets adjusted for appreciation

Total liabilities

What are your business goals?

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