

Financial Surety Underwriters, LLC

BUSINESS PLAN QUESTIONNAIRE

Name of business: _____ Today's date: _____

Address of business office: _____

Year business started: _____ If corporation, date of incorporation: _____

Financial year end: _____ Number of employees when co. started: _____ Now: _____

Name and position of any relatives working in the business: (Use additional sheet if needed)

1. _____ 2. _____

Sales volume in first year of business: \$ _____ Sales for latest year: \$ _____

What exactly, does your business do? _____

Does owner have life insurance? _____ How much? _____

Is life insurance to be paid to the business? _____

Is there enough life insurance coverage to cover all outstanding work on hand? _____

How much life insurance is there for the owner's family? _____

Give a description of management experience and continuity provisions owner has for business:

What will happen to business when owner retires? _____

Please outline business goals for the next 12 months: _____
