

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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