

## BUSINESS CONTINUITY INSTRUCTIONS

**THE FOLLOWING PEOPLE CAN BE GIVEN RESPONSIBILITY TO CONTINUE AND TO SUPERVISE THESE ACTIVITIES:**

Business Operations:

Sales Operations:

Financial Decisions:

Internal Administration:

**UPON MY DEATH OR PERMANENT INCAPACITY, THE COMPANY SHOULD BE:**

- Continued      or       Liquidated
- Sold to an outside third party. (If yes, complete the section below)
- Sold to employees, specifically:

How will they fund it: \_\_\_\_\_

- Transferred to family members; specifically:

**As guidance, I suggest that:**

- An acceptable price range would be between \$ \_\_\_\_\_ and \$ \_\_\_\_\_
- A minimum price range would be \$ \_\_\_\_\_
- You secure a valuation from: \_\_\_\_\_
- You ask \_\_\_\_\_ to recommend a valuation specialist

**If I have indicated that a sale is appropriate, below are names of people/companies that have expressed interest or who I believe would be interested in acquiring the company:**

Has expressed interest

I think may be interested

\_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Company Name*

Has expressed interest

I think may be interested

\_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Company Name*

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**ESTATE PLANNING INSTRUCTIONS:****People who have been given authority:**

Power of Attorney - \_\_\_\_\_

Representation Agreement - \_\_\_\_\_

Signing Authority on banking - \_\_\_\_\_

Executor - \_\_\_\_\_

Other - \_\_\_\_\_

**Location of specific documents:**

Current Will - \_\_\_\_\_

Shareholders Agreement - \_\_\_\_\_

Trust Agreement(s) - \_\_\_\_\_

Employment Agreement(s) - \_\_\_\_\_

Other - \_\_\_\_\_

Other - \_\_\_\_\_

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**ADDITIONAL QUESTIONS**Are there credit lines that will be impacted if I die?  Yes  No

If yes, provide details: \_\_\_\_\_

Are any key employees flight risks if I die?  Yes  No

If yes, indicate who: \_\_\_\_\_

Where will my spouse and/or family's income come from if I die suddenly or become incapacitated?

If I become disabled or deceased, will the employee benefits continue for my spouse?  Yes  NoIf I become disabled, will my employee benefits and salary continue?  Yes  No

If yes, how will it be funded: \_\_\_\_\_

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**OTHER SPECIFIC AREAS TO ADDRESS:**

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