



# PLOTTING THE COURSE...

TO COMPLETE INSURANCE PROTECTION

## Business Valuation Services



*"Serving Our Clients Since 1981"*



**Chris D. Callen, Insurance Agent**

*"Helping Professionals Nationwide"*

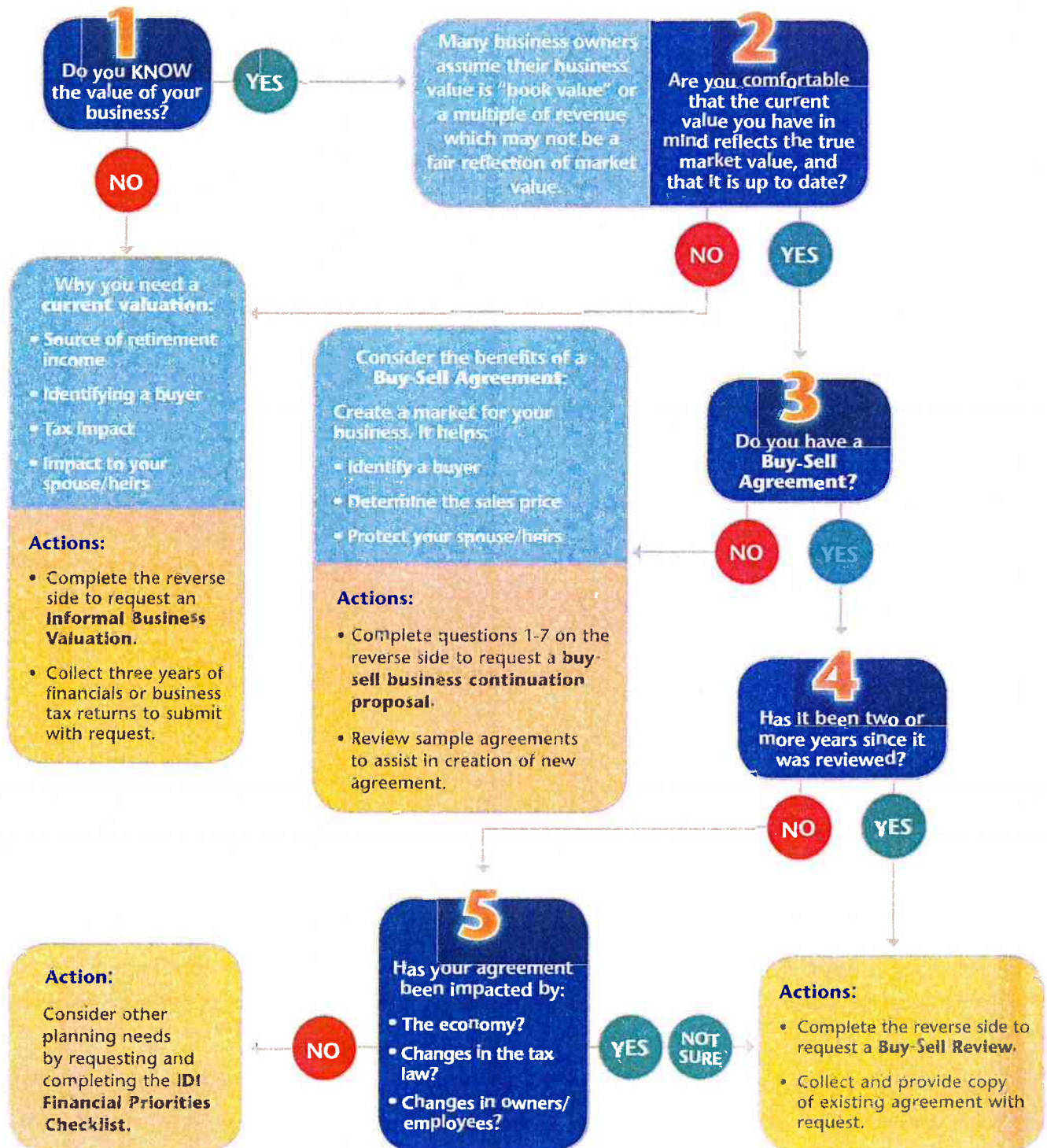
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# Protect Your Business. Help Secure Your Future.



## Individual Disability Insurance

Which proposal(s) are you requesting?  Informal Business Valuation  Buy-Sell Review  Business Continuation Proposal

Complete the following:

1. Business name: \_\_\_\_\_
- 1a. Owner(s) name: \_\_\_\_\_
- 1b. City, state of company headquarters: \_\_\_\_\_
- 1c. Nature of your business: \_\_\_\_\_
- 1d. Years of business operation? \_\_\_\_\_
- 1e. Issue state: \_\_\_\_\_
2. Type of business entity:  
 C corporation  S corporation  Other \_\_\_\_\_  
 Sole proprietorship\*  Partnership \_\_\_\_\_
3. Number of business owners:  1  2  3  4+
4. Total number of employees:  
 1-9  51-200  501+  
 10-50  201-500
5. Number of key employees (those critical to the success of the business): \_\_\_\_\_
6. Annual growth rate: \_\_\_\_\_%
7. Business tax rate (Enter owner's tax rate if business is taxed as a flow-through organization.): \_\_\_\_\_%
8. Do you have a buy-sell agreement?  Yes  No  
If yes, provide a copy of the agreement.
9. To whom do you intend to sell?  
 Family  Key employee  
 Third party  Co-owner
10. Number of children: \_\_\_\_ in business; \_\_\_\_ out of business
11. Names and contact information for the following:  
Attorney: \_\_\_\_\_  
Accountant: \_\_\_\_\_  
Banker: \_\_\_\_\_
12.  Three full years of the most recent income statements and balance sheets\*, or  
 Three full years of the most recent company tax returns (included with RFP)

\* Sole proprietorships: In addition to providing three years of Schedule Cs, also submit an informal balance sheet of business assets and

*For financial professional use only. This section must be completed for processing to begin.*

### PRODUCER INFORMATION

Advisor name: **Chris D. Callen**  
 CFP  CLU®  ChFC®  CEBS  LUTCF  Other: \_\_\_\_\_

### PROPOSAL DELIVERY

Phone number: **614-899-2541**  
Email address: **cdcallen@cdcallen.com**

**Principal Columbus**