



CONTINUITY AGREEMENT INFORMATION

Now that you have decided to develop a continuity plan, there are a few basic questions we need answered. Please provide the following initial information so that we can prepare a draft of your continuity agreement for you.

SELLER INFO

Legal Name

Address

State of Residence

BUYER INFO

Legal Name

Address

State of Residence

SELLER'S BENEFICIARY INFO

Legal Name

Address

Email Address

Phone Number

PRICE AND TERMS OF SALE

Upon a Trigger Event ...

FIRST PAYMENT TIMING

Date first payment will be made after trigger event.

30 days

60 days

90 days

Other

PAYMENT FREQUENCY

Monthly

Quarterly

Semi-annually

Annually

Other

SUBSEQUENT DATE OF PAYMENT

1st

15th

30th

Other

HOW WILL THIS BE TAXED?

SELLER

BUYER

Ordinary Income (1099)

Immediate Write Off

Capital Gains

Amortized over 15 years

Other:

Other:

Additional Notes