

Family Business Transition Planning Intake Sheet

Ament Law Group, P.C. — Succession / Transfer / Next Generation

Whether you are thinking about transitioning the business in 2 years or 20, planning ahead dramatically expands your options. Fill in what you know.

About You (Current Owner)

First Name

Last Name

Phone (best)

Email

Date of Birth

How long have you owned the business?

Marital status

Spouse's name (if applicable)

The Business

Business name and legal entity type (LLC, S-corp, partnership, etc.)

What does the business do?

Year established

Number of employees

Approximate annual revenue

Approximate business value

Other owners / co-founders (names, ownership %, role)

Is there an existing operating agreement or shareholder agreement?

This document controls what happens in a transfer — if it is outdated it may conflict with your plans

Real Estate Connected to the Business

Business owns the property it operates from I personally own property leased to the business No real estate connected to the business

Address(es) and approximate value(s)

Will real estate transfer with the business or stay with you?

Who Takes Over?

One child Multiple children equally Multiple children — unequal None Family employee / key person Not decided yet

Intended successors:

Name	Relationship	Currently in Business?	Ownership % Goal

Fairness & Non-Participating Children

One of the hardest parts of family business succession is children who are not involved in the business.

