

## The Business Owner Checkup™ Provided By

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Have you started operating any new business this year that need to have an LLC or corporation created?	<b>YES</b>	<b>NO</b>
Have you filed your required annual filings with the Division of Corporations?	<b>YES</b>	<b>NO</b>
Have you updated your Buy Sell Agreement with <ul style="list-style-type: none"> <li>• A Current valuation?</li> <li>• To include new partners?</li> <li>• Is it sufficiently funded?</li> </ul>	<b>YES</b> <b>YES</b> <b>YES</b>	<b>NO</b> <b>NO</b> <b>NO</b>
Do you have any new employees that require an Employment Agreement?	<b>YES</b>	<b>NO</b>
Have you completed your annual minutes this year to keep your corporate shield intact?	<b>YES</b>	<b>NO</b>
Have you updated your estate plan to be current with the 2007 Trust Code Revisions?	<b>YES</b>	<b>NO</b>
Have you updated your estate plan to be current with the 2001 IRS IRA Regulations?	<b>YES</b>	<b>NO</b>
Have you updated your estate plan to be current with any personal goals or changes you have?	<b>YES</b>	<b>NO</b>
Have you coordinated any new real estate, life insurance or financial products you purchased this year with your estate plan?	<b>YES</b>	<b>NO</b>
I would like to schedule a complimentary meeting with a law firm to discuss my answers.	<b>YES</b>	<b>NO</b>

If a complimentary meeting is requested, please complete information below and fax to (813) 286-3600. A law firm representative will be in touch to schedule your meeting.

Client Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Please remember I am not a lawyer; nor is this intended to be interpreted as legal, financial, or tax advice. I am not paid or compensated in any way by this law firm. In addition, I am not responsible for your failure to follow through on seeking professional advice.

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**The Strategic Counsel, L.C.**

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