

# Scope and Quote Request Business Succession



## Details required to complete documentation and advice by our member law firms.

This form is not required until you and your client have accepted the scope and quote provided by the Legal Hub.

I agree to the legal hub terms and conditions  Yes  No

### Adviser Details

Adviser name

Practice name

Adviser name

Practice name

### Business details

Business name

Street address

Postal address

### Current business entities

Company  Unit Trust  Partnership  Family Trust  Other (please specify):

Name of business entities

Description of business activities

Estimated value

### Valuation provided by

Client  Accountant  Other

### No of principals/ business owners

Principal 1 name

Principal 1 % shares

Principal 2 name

Principal 1 % shares

Principal 3 name

Principal 1 % shares

Principal 4 name

Principal 1 % shares

Principal 5 name

Principal 1 % shares

Principal 6 name

Principal 1 % shares

Principal 7 name

Principal 1 % shares

Principal 8 name

Principal 1 % shares

Do the clients have any form of insurance funded buy/sell deed already in place?

Yes (please provide a copy)

No

Do the clients have any form of shareholders agreement (or other stakeholder agreement) in place to deal with non-insurable events?

Yes (please provide a copy)

No

Please advise any specific objectives

If you have any business documents or additional supporting documentation, please attach