

## **“I ALREADY HAVE A BUY/SELL AGREEMENT”**

- 1. What method of Policy Ownership does it use?**
- 2. Does it just do Buy/Sell?**
  - Retirement?**
  - Shortfalls in Insurance?**
  - Uninsurability?**
  - Personal Guarantees?**
  - Loan Accounts?**
- 3. Does it require a valuation?**
- 4. When was Price last reviewed?**
- 5. Does it mention their current Policies (or the original Policies)?**
- 6. When was Cover last reviewed?**
- 7. Are all current Proprietors and Lives Insured parties?**
- 8. Are their percentages up to date?**