

FAMILY INTAKE- DIVORCE BUSINESS INTERESTS

Date: _____

File No. _____

Docket No. FD- _____

Client: _____

Spouse: _____

Business Name: _____

Business Address: _____

Form of Business Organization: LLC PC LP INC. Other: _____

Client's Interest: _____ Spouse's Interest: _____

Type of Business: _____

Persons Who May Be Contacted:

Accountant for Business: _____

- Address: _____
- Phone Number: _____

Accountant for Client: _____

- Address: _____
- Phone Number: _____

If the client is not the party active in the business, have arrangements been made for an independent accountant to examine the books and records of the business?

☐ Yes When, Where and by Whom: _____ ☐ No

Attorney for Business: _____

- Address: _____
- Phone Number: _____

Appraiser for Business: _____ (if independent appraisal of assets of business is required)

- Address: _____
- Phone Number: _____

Has the business interest or another interest in the same business been the subject to death or gift taxes? ☐ Yes ☐ No Copies Received? ☐

3.			
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Offers to Buy or Sell the Business Interest

Date of Offer: _____

Person Making the Offer: _____

Person to Whom the Offer is made: _____

Total Amount of Offer: \$ _____

Terms of Offer:

Sales of Other Interests in Same Business

Date of sale: _____

Name of Seller: _____

Name of Purchaser: _____

Description of interest sold:

Total Price \$ _____

Terms of Sale:

Tentative Conclusions

Present value of business interest: \$ _____

Allocable as follows: \$ _____

- Separate Property: \$ _____
- Jointly Owned Property: \$ _____