



**Eternal Word Television Network (EWTN)**  
CLOSELY-HELD BUSINESS QUESTIONNAIRE

Thank you for your interest in exploring the potential for a charitable contribution using some value of your closely-held business. Your notes below will help us learn if there is an appealing gift strategy to discuss.

NAME: \_\_\_\_\_ JOB TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_

NAME OF BUSINESS: \_\_\_\_\_

How is your business structured for both federal and state purposes?

- Closely-held C Corp                       S Corp
- General / Limited Partnership             Family Limited Partnership
- Limited Liability Corporation             Sole Proprietorship
- Other

How many partners/decision makers are in your company? What is your role? \_\_\_\_\_

What portion of the company do you own? In what form \_\_\_\_\_ shares \_\_\_\_\_ percentage \_\_\_\_\_ other

Is anyone in your immediate family an owner/partner/shareholder? Please provide details.

Have you had the company appraised? When, and for what value?

What is your business succession plan:

- sell it to employees             Give/ sell to family or trusts             Sell to competitor             other:

If your plan is to sell in the near term, are there any prospective buyers?

Is anything pertaining to the sale on paper yet?

Other notes you believe may be pertinent:

Questions: Contact Legacy Giving (205) 271- 4522 or email at [legacygiving@ewtn.com](mailto:legacygiving@ewtn.com)

