



# Instructions for a Business Succession Agreement

## Your details

Name

Date

Organisation

ACN/ABN

Delivery  
Address

Phone

Email

## Agreement details

- **Company details** (name, ACN, registered office address)
- Description of **Business** carried on by the Company
- **Shareholder details** (name, address, number and class of shares held)
- **Principals** in business (name, address, which shareholder are they related to)
- What **types of events** that happen to a Principal will trigger the put and call options:
  - **Insurable:** Death, Terminal Illness, TPD?;
  - **Non-insurable:** retirement by x month's notice, convicted of an indictable criminal offence, unsound mind, bankruptcy?
- **Value of Shares** - How will the outgoing shareholder's interest be valued?/ what is the purchase price for the shares? (market value at commencement and updated by annual agreement?)
- Will purchase price be partly/fully paid by **insurance proceeds**? If yes details of Insurance policies (Principal, Events covered, Policy owner, Insurer, level of cover, policy number (if known))
- **Payment terms** – period, instalments, discount for early payment, interest? Different terms for different event types?
- **Other** specific requirements?

## Logo

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No - we will include our logo

## Acceptance of terms and conditions

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