



BUSINESS SUCCESSION APPOINTMENT SETTING PROGRAM

Company:	Nguyen Auto Parts	Website:	www.nguvenautoparts.com
Prospect Name:	Peter Dillon	Email:	p.dillon@nguvenautoparts.com
Title:	President	Telephone:	765-555-1212
Address	123 Any Street	Alt-Phone #:	765-555-9999 (cell)
Address2:		Appt. Number:	123-1234
City	West Lafayette	Client Name:	Jonah Smith
State	IN	Produced By:	Dana Dilts
Zip	47906	Produced Date:	March 4th
County	Tiptecanoe	Appt. Date:	March 12th
Meeting Location	Same as above	Appt. Time:	11:00 AM

Information Provided By List Source

Type of Business:	Automotive Parts and Supplies	Sales Volume:	\$3,300,000
Year Established:	1991	Number of Employees:	27

Information Gathered by The PT Services Group

Company structure:	S Corp
Number of owners:	3- (Peter, his brother, and his father)
Currently has a buy/sell agreement in place:	Yes
They consider their business a family business:	Yes
The family members involved are:	His father and brother
Plan to pass the business on to a family member:	Yes
Plan to sell the business to another individual:	No
Prospect would like to retire:	"Not for a very long time."
Age of prospect: (approximate age of partners)	Peter, 50; brother, 45; father, 77
Key employees:	Yes (brother)
Positions they hold:	General manager

Additional Comments:

You will be meeting with Peter Dillon to discuss business continuation and succession planning. The company has been in the area since 1991 and is a wholesale auto parts business. Peter said that his father wants to transfer the business to himself and his brother. While there have been many conversations about transferring the business and they have a buy-sell agreement in place, they fear the agreement is out of date and may not be funded properly.