01 / RECORD THE FACTS

Weigh a partnership buy-in

Separate purchase price, financing, distribution assumptions and ownership terms.

Prepared on

Review on

Record the source and date for every estimate or term. Mark missing facts as unknown.

1 Purchase price and ownership share

2 Financing rate, term and fees

3 Distribution assumptions and evidence

For preparation only. This worksheet does not provide financial, legal, tax or insurance advice.
Verify current rules and written terms; use a qualified professional for advice about your situation.

02 / CHECK THE OPEN QUESTIONS

Weigh a partnership buy-in

Separate purchase price, financing, distribution assumptions and ownership terms.

Keep questions beside the relevant terms. Bring your original documents to review.

Record the source and date for every estimate or term. Mark missing facts as unknown.

4 Rights, obligations and exit terms

5 Questions for independent advisers

6 Sources, next step and review date

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