

Executive Benefit Planning

Ask Yourself...

What would the impact on your business be if a **key employee started his/her own business or went to work for a competitor?**

Are you making effective use of business dollars to help achieve your **personal financial security objectives?**

Objective: Reward and Retain Key Employees
Issues to Consider: <ul style="list-style-type: none">• What is the value of your key employees to your business success?• Do you have any selective benefit programs to assure the retention and loyalty of your key employees?• What types of benefits are important to the people who are critical to your business?• Are your current benefit plans meeting these expectations?

Objective: Use Business Dollars to Help Satisfy the Owner's Personal Financial Security Needs
Issues to Consider: <ul style="list-style-type: none">• If you had died or become disabled yesterday, would there be an adequate income to maintain your family's lifestyle today?• Will you have the funds available to meet your education and/or retirement goals?• Will your estate have sufficient liquidity to pay estate taxes and other settlement costs?• Are you taking full advantage of business dollars to meet your personal financial security goals?