

Employee Benefit Action Checklist

Which of the following employee benefit plans is the business:

Already Using

Interested In

Life Insurance Benefits

Health Insurance Benefits

Qualified Retirement Plans

Disability Income Benefits

Vision/Dental Benefits

Long-Term Care Insurance

Cafeteria Plan

Voluntary Benefit Plan

Selective Executive Benefits

Is the employer satisfied with the current employee benefit plan?

Which new benefit(s) are most important now?

What are the business owner's objectives in regard to this business providing personal and family financial security?
