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PHYSICIAN & DENTAL PRACTICE SERVICES

I. PRACTICE CONTINUITY

- A. Strategies to help provide efficient protection and realization of physician/dental practice value in the event of:
- Death
 - Disability
 - Retirement
 - Practice Departure

How will you, your family and other partners get the full value from your practice?

II. EXECUTIVE BENEFITS

- A. Supplemental benefits for reward, recruitment and loyalty:
- Tax-advantaged retirement plans
 - Occupation Specific Disability Income Insurance Protection
 - Strategies to Address Family Income Planning Needs

*How can you retain the key talent that is helping you and your practice succeed?
Are you and your partners being compensated tax-efficiently?*

- B. Help to protect value of the practice in the event of the loss of a partner(s).

What happens to you...to your practice, if something happens to your key people?

III. ESTATE CONSERVATION & DISTRIBUTION STRATEGIES

- A. Seek to Minimize & Fund Projected Tax Liabilities
- B. Assist with Estate Equalization for Children
- C. Audit of Existing Life Insurance Programs
- D. Review Use of Annual and/or Lifetime Gifts

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