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## BUSINESS SERVICES

### I. BUSINESS CONTINUITY

- A. Strategies to help provide efficient protection and realization of shareholder value in the event of:
- Death
  - Disability
  - Retirement
  - Termination

*How will you, your family and other shareholders get the full value from your business?*

### II. EXECUTIVE BENEFITS

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

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

- B. Help to protect the company in the event of the loss of the executive.

*What happens to you...to your business, 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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