Financial Strategies

______________________________________ Name

______________________________________ Best contact number and time to reach you

______________________________________ Preferred email

______________________________________ Company Name

______________________________________ Address, City and Zip Code

______________________________________ Occupation/Title

I'm interested in the following Strategies/Planning Tools:

Personal Planning

__ Tax Advantaged Retirement Planning

__ Tax Bracket Planning

__ Tax-Favored Retirement Savings

__ Not Outliving Income

__ Life Insurance Review/ Needs

__ Guaranteed Lifetime Income

__ IRA, 401K, 403B Payout Strategies

__ Inflation and Income Planning

__ Tax Free Retirement Income

__ Alternatives for Long Term Care

Business Planning

__ Executive Bonus

__ Business Continuation/ Succession

__ Key Employee Insurance

__ Business Valuation

__ Deferred Compensation

__ Owner Only Retirement Programs

__ Buy/Sell Agreement Funding

__ Business Protection/ Asset Protection

__ Non-Qualified Retirement Plans

__ Selective Employee Profit Sharing

__ Shifting Business Assets to Your Personal Balance Sheet on a Tax Favored Basis+

Estate/ Wealth Planning

__ Methods of Charitable Giving

__ Special Needs Planning

__ Minimizing Estate Taxes

__ Legacy & Estate Planning

__ Wealth Replacement Vehicles

__ Life Insurance Trust

Are you aware that your business may be able to help satisfy many of these personal planning priorities?

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