

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
- Shifting Business Assets to Your Personal Balance Sheet on a Tax Favored Basis+
- Owner Only Retirement Programs
- Buy/Sell Agreement Funding
- Business Protection/ Asset Protection
- Non-Qualified Retirement Plans
- Selective Employee Profit Sharing

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?

Financial Strategies Form



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