

# Business Owner Planning Needs

Below is a list of concerns that may be of particular interest to you, the business owner. Indicate the level of importance of each item with a check mark.

	Level of Importance		
	High	Medium	Low
<u><i>Business Concerns</i></u>			
Business Succession Planning	_____	_____	_____
Key Employee Planning	_____	_____	_____
Executive Benefit Planning	_____	_____	_____
 <u><i>Estate Concerns</i></u>			
Planning Estate Distributions	_____	_____	_____
Estate Tax Planning	_____	_____	_____
Charitable Planning	_____	_____	_____
Survivorship Needs Planning	_____	_____	_____
 <u><i>Retirement Concerns</i></u>			
Planning for Your Retirement	_____	_____	_____
Qualified Retirement Plans	_____	_____	_____
Traditional IRA/Roth IRA	_____	_____	_____
Investment Risk Analysis	_____	_____	_____
 <u><i>Other</i></u>			
Long-term Care Planning	_____	_____	_____
Education Planning	_____	_____	_____
Disability Income Planning	_____	_____	_____
Life Insurance Planning	_____	_____	_____