

Business Owner Planning Checklist

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
Business Concerns			
Business Succession Planning	_____	_____	_____
Key Employee Planning	_____	_____	_____
Executive Benefit Planning (Non-Qualified)	_____	_____	_____
Estate Concerns			
Estate Planning Distributions	_____	_____	_____
Estate Tax Planning	_____	_____	_____
Charitable Planning	_____	_____	_____
Survivorship Needs Planning	_____	_____	_____
Retirement Concerns			
Planning for Your Retirement	_____	_____	_____
Qualified Retirement Plans	_____	_____	_____
Traditional IRA/Roth IRA	_____	_____	_____
Investment Risk Analysis	_____	_____	_____
Other			
Life Insurance Review	_____	_____	_____
Long-Term Care Planning	_____	_____	_____
Disability Income Planning	_____	_____	_____

Personal Information

Name: _____

Business Name: _____

Address: _____

Phone: _____

