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# Business Owner Planning Needs

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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 |
| <b>Business Concerns</b>      |                     |        |     |
| Business Succession Planning  |                     |        |     |
| Key Employee Planning         |                     |        |     |
| Executive Benefit Planning    |                     |        |     |
| <b>Estate Concerns</b>        |                     |        |     |
| Planning Estate Distributions |                     |        |     |
| Estate Tax Planning           |                     |        |     |
| Charitable Planning           |                     |        |     |
| Survivorship Needs Planning   |                     |        |     |
| <b>Retirement Concerns</b>    |                     |        |     |
| Planning for Your Retirement  |                     |        |     |
| Qualified Retirement Plans    |                     |        |     |
| Traditional IRA/Roth IRA      |                     |        |     |
| Investment Risk Analysis      |                     |        |     |
| <b>Other</b>                  |                     |        |     |
| Long-term Care Planning       |                     |        |     |
| Education Planning            |                     |        |     |
| Disability Income Planning    |                     |        |     |
| Life Insurance Planning       |                     |        |     |