

Keep track of the factors that are important to you



Protecting the Business

- Key-Person Coverage
- Buy-Sell Agreement
 - Cross-Purchase Plan
 - Stock Redemption Plan
 - Wait-and-See Plan
 - Combination Buy-Sell
- Business Valuation
- Continuing a Family Business

Retaining Employees

- Nonqualified Deferred Compensation Planning
 - Voluntary Deferral
 - Supplemental Executive Retirement Plan (SERP)
 - 401(k) Look-Alike Plan
- Qualified Retirement Plans
 - Defined Benefit (i.e., 412(e)(3))
 - Defined Contribution (i.e., 401(k))
- Executive Retention Programs
 - Executive Bonus Plan
 - Restricted Executive Bonus Arrangement (REBA)

Planning for the Future

- Disability Coverage¹
- Annuities
- Long-Term Care Insurance¹
- Retirement Distribution Strategies
 - Distribution Analysis
 - Stretch-Out IRA
- Estate Protection²
 - Estate Tax Analysis
 - Gifting Strategies
 - Trust Planning

Keep track of the factors that are important to you as a small business owner: retaining employees with attractive benefits, protecting against unforeseen risks, planning for your own future, and ensuring business continuation.