Life

North American Company for Life and Health Insurance®

NORTH AMERICAN®
A Sammons Financial Company

ADVANCED MARKETS

Individual & Business Solutions Made Simple

Five Core Questions for Comprehensive Planning

Answer each question below and then rank them by order of importance to your overall financial plan.

(One being most important and five least important)

1. **Business Transition Planning**
   Have you created a plan to transfer your business to a certain party at an agreed upon price? Yes ☐ No ☐ Rank ☐

2. **Business Preservation**
   Have you considered the impact on your business due to the departure or death of a key employee? Yes ☐ No ☐ Rank ☐

3. **Wealth Accumulation**
   Have you considered how to minimize the impact of taxes in attaining your personal wealth and retirement goals? Yes ☐ No ☐ Rank ☐

4. **Estate Planning**
   Has the successful transfer of your legacy to family or charity been considered in your planning? Yes ☐ No ☐ Rank ☐

5. **Executive Benefits**
   Are there proactive steps you must take to retain, reward and recruit key employees? Yes ☐ No ☐ Rank ☐

Talk to your financial professional to see how North American can help you achieve your goals.

The term financial professional is not intended to imply engagement in an advisory business in which compensation is not related to sales. Financial professionals that are insurance licensed will be paid a commission on the sale of an insurance product.

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