

North American's business solutions

Executive bonus agent checklist

Key people

This may include anyone whose loss would have a direct or indirect financial impact on the company.

KEY PERSON ROLE	NAME	SALARY
High-level executives		
Key relationship contacts		
Specialized skills		
Specialized knowledge		
Key sales and marketing		
Managers and directors		
Special project coordinators		
Owners		
Others		

Types of bonus arrangements

- Executive bonus
- Split dollar
- Non-qualified deferred compensation
- Retirement planning

Payout length

- Until retirement: _____
- Until date: _____
- Until age: _____
- Other: _____

Type of coverage

- Indexed universal life insurance
- Universal life insurance
- Term life insurance

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Administrative Office
One Sammons Plaza
Sioux Falls, South Dakota
NorthAmericanCompany.com