

# Business Owner Planning Needs

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			



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