



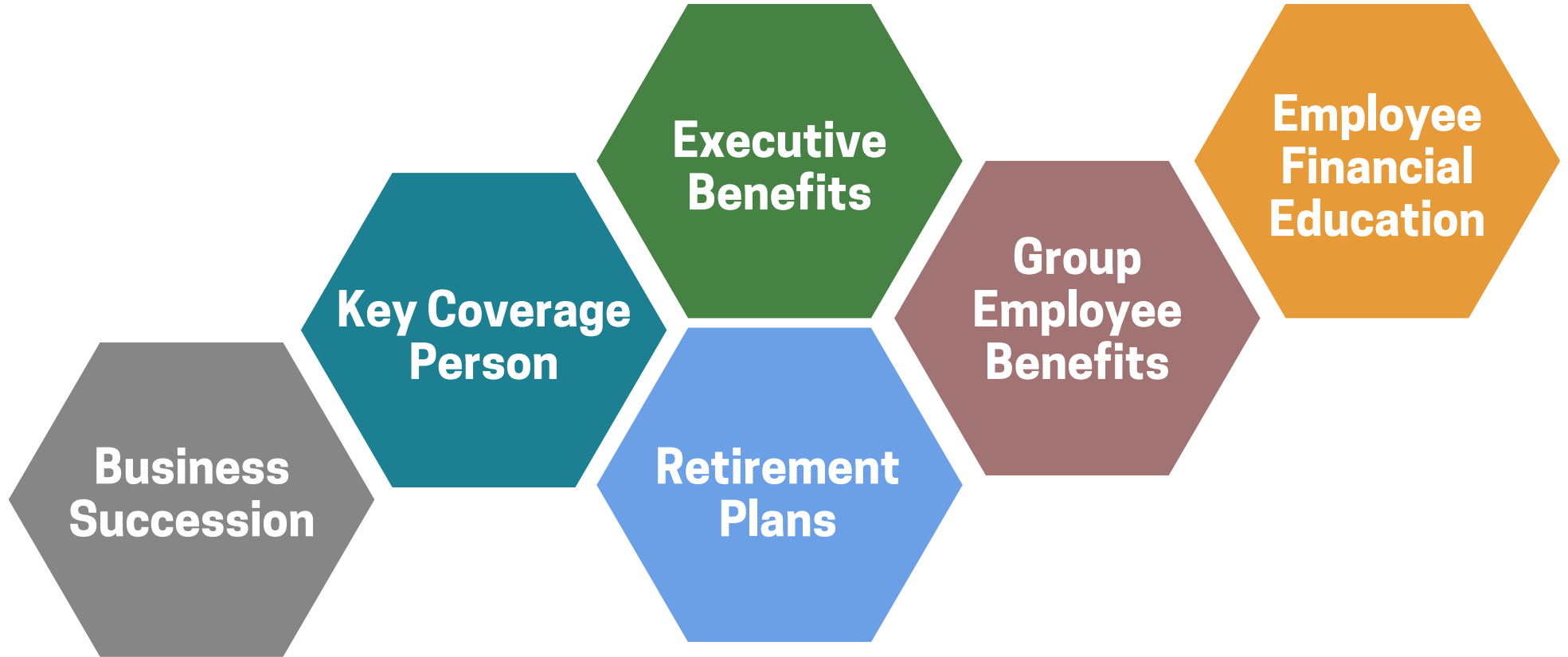
**FINANCIAL
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6 Areas of Business Planning



6 Areas of Business Planning

Business Succession	Key Coverage Person	Executive Benefits	Group Employee Benefits	Retirement Plans	Employee Financial Education
<ul style="list-style-type: none"> ✓ Buy/Sell Funding ✓ Exit Planning ✓ Succession Preparation ✓ Talent Management ✓ Purchase Funding ✓ Estate Planning ✓ Business Value Improvement 	<ul style="list-style-type: none"> ✓ Golden Handcuffs ✓ Life Insurance ✓ Disability ✓ Business Overhead ✓ Directors & Officers Coverage 	<ul style="list-style-type: none"> ✓ Total Reward Strategy ✓ Bonus Plans ✓ Equity Programs ✓ Life Insurance ✓ Supplemental Individual Disability ✓ Financial Planning ✓ Non-qualified Plans ✓ Benefit Plan Funding 	<ul style="list-style-type: none"> ✓ Health ✓ Welfare ✓ Voluntary ✓ Non-cash Recognition ✓ Benefit Optimization 	<ul style="list-style-type: none"> ✓ Defined Contribution Plans <ul style="list-style-type: none"> • 401(k) • 403(b) • SEP • SIMPLE ✓ Defined Benefits <ul style="list-style-type: none"> • Pensions • 412(e) ✓ Profit Sharing Programs 	<ul style="list-style-type: none"> ✓ Workshops ✓ Holistic Planning ✓ Benefit Communication ✓ One-on-One Consultations