

General information regarding topics and potential talking points:

**#1 – “I Know What My Business is Worth”**

* Buy Sell Agreements
* Business Valuation
* Buy Sell Funding

**#2 – “I’m Too Busy Running the Business”**

* Estate Planning
* Asset Protection
* Succession Planning
* Funding Estate Taxes

**#3 – “That’ll Never Happen to Me”**

* Disability Insurance
* Disability Buy Out
* Key Man/Golden Handcuffs
* Deferred Comp
* Business Overhead Expense Coverage
* Retirement Plan Contribution Coverage

**#4 – “There’s Plenty of Time for That”**

* Retirement Planning
* Retirement Income
* Partnership Agreements

**#5 – “My Business is My Retirement”**

* Asset Allocation
* Conservation of Assets
* Diversified Investments
* Long Term Care

**#6 – “You Can’t Beat Uncle Sam”**

* Tax Strategies
* Exit Planning