

# The Financial Success of a Business owner...



...is a personal issue

## THE SMALL BUSINESS OWNER “BIG 5”

Based on our experience, your employees probably have “5” financial concerns. You may have “5” too, but yours are different. Unfortunately, the two do not always overlap. In order to satisfy the needs/wants of the employee, a business owner often designs benefits around the employee. The net result is that they may not meet the business owner’s financial objectives. There are opportunities for the business to incorporate strategies which are more aligned with your needs/wants as the owner(s) of the business.

My focus with a business owner is to pursue financial strategies which are designed to meet the needs of the owner and/or highly compensated individuals in the business. This requires an understanding of typical programs offered in business but also experience in the use of selective benefits which can be incorporated to assist the business owner and key people.

To explore how you might benefit, I utilize a short questionnaire which covers “5” key topics. This will give us both a feel for how you are doing and create a good place to start a dialogue.

## THE FIVE TOPICS ARE:

- 1) Recruit, Retain and Reward talent
- 2) Business Succession & Continuation Planning
- 3) Income Continuation
- 4) Risk Management
- 5) Estate Planning

Each of these five primary topics include a variety of sub topics, which go beyond the scope of this piece.

If you are interested in visiting, let me know. It would be a pleasure to spend some time with you.



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