



Individual & Business Solutions Made Simple

Five Core Questions for Comprehensive Planning

Answer each question below and then rank them by order of importance to your overall financial plan.

(One being most important and five least important)

1. Business Transition Planning

Have you created a plan to transfer your business to a certain party at an agreed upon price?

Yes

No

Rank

2. Business Preservation

Have you considered the impact on your business due to the departure or death of a key employee?

Yes

No

Rank

3. Wealth Accumulation

Have you considered how to minimize the impact of taxes in attaining your personal wealth and retirement goals?

Yes

No

Rank

4. Estate Planning

Has the successful transfer of your legacy to family or charity been considered in your planning?

Yes

No

Rank

5. Executive Benefits

Are there proactive steps you must take to retain, reward and recruit key employees?

Yes

No

Rank

***Talk to your financial professional to see how
Midland National can help you achieve your goals.***

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