



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

Have you taken the 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.

The term financial professional is not intended to imply engagement in an advisory business in which compensation is not related to sales. Financial professionals that are insurance licensed will be paid a commission on the sale of an insurance product.

Neither Midland National nor its agents give legal or tax advice. Please consult with and rely on a qualified legal or tax advisor before entering into or paying additional premiums or before commencing any charitable giving plan.

Sammons Financial® is the marketing name for Sammons® Financial Group, Inc.'s member companies, including Midland National® Life Insurance Company. Annuities and life insurance are issued by, and product guarantees are solely the responsibility of, Midland National Life Insurance Company.