



Financial fundamentals for your practice

Assess your level of financial security by indicating whether you have or need the products and services listed below.

| | | Products and services | Have | Have, but would like to review | Need |
|---------------------------|---------|--|------|--------------------------------|------|
| For you and your business | For you | Personal liability insurance | | | |
| | | Disability income insurance | | | |
| | | IRA or retirement savings | | | |
| | | Education funding | | | |
| | | Professional liability insurance | | | |
| | | Life Insurance (term or whole) | | | |
| | | Medical insurance | | | |
| | | Comprehensive fee-based financial plan | | | |
| | | Disability insurance | | | |
| | | Customized asset management | | | |
| | | Long-term care insurance | | | |
| | | Annuities | | | |
| | | Estate planning* | | | |
| | | Banker*, accountant*, attorney*, financial advisor | | | |
| | | Business overhead insurance | | | |
| | | Payroll processing* | | | |
| | | Group benefits | | | |
| | | Worker's compensation* | | | |
| | | Profit sharing | | | |
| | | Key person coverage | | | |
| | | Golden handcuffs for key employees and partners | | | |
| | | Business valuation | | | |
| | | Business transition strategy | | | |

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