



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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