

WHAT ARE YOUR GOALS AND OBJECTIVES?



FINANCIAL PLANNING

1. Are you frustrated with the limits on your qualified plan contributions?
2. Do you know if you are accumulating sufficient capital to help ensure your financial independence in retirement?
3. Would tax-free income in retirement be attractive to you?
4. Have you planned for out-of-pocket health care and long term care costs during retirement?
5. Have you established and funded any legacy plans or charitable objectives?

WEALTH MANAGEMENT

1. How important is reducing income tax liabilities driven by your investment portfolio?
2. Are you interested in hedging strategies to help manage downside risks in your investment portfolio?
3. How important is tax-advantaged liquidity within your investment portfolio?
4. How much of your net worth is creditor protected?
5. Have you positioned your investment portfolio to address untimely death?

BUSINESS PLANNING

1. How important is corporate contingency capital for opportunities and obstacles?
2. Have you optimized the ROR on your current corporate capital?
3. How do you plan to monetize and personally realize the value in your business?
4. Have you funded your business transition plan?
5. Have you considered your key people as a potential component of your business transition or succession plan?

WORKSITE SOLUTIONS

1. What is the one thing you wish you could improve about your 401(k) plan?
2. Have you explored the impact improved participant financial wellness could have on your corporate culture?
3. How important are your key people to your business success?
4. Have you implemented any plans to attract, reward and retain mission critical employees?
5. Would your highest paid employees like to defer more of their income on a pre-tax basis?

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