

EXECUTIVE FINANCIAL GROUP

YOUR FUTURE, OUR FOCUS



BUSINESS OWNERS SUCCESSION STRATEGIES (BOSS)

- Exit Planning
- Business Valuation
- Business Continuation Planning
- Buy-Sell Agreements
- Executive Bonus Programs
- Key Employee Recruiting and Retention

YOUR FUTURE OUR FOCUS

Your premier financial services firm that provides customized solutions for Business Professionals.

We focus on strategies to reduce your taxes. We constantly strive to achieve the highest standards of integrity and professionalism.

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IF YOU BECAME DISABLED, DIED OR RETIRED TODAY, WHO WOULD RUN AND MANAGE YOUR BUSINESS TOMORROW?

BUSINESS PROTECTION

Owning your own business can be one of the most satisfying experiences of your life ... but owning a business entails a lot of responsibilities - to your business, your employees and your family.

ASK YOURSELF THE FOLLOWING QUESTIONS:

- Do I have a plan in place to improve my current tax situation?
- Do I have a clear written plan to exit my business?
- What will happen to my business if I become disabled or die?
- What can I do to help ensure that my most vital employees remain loyal to the business?
- Do I have a plan in place to use company dollars to fund my retirement?

ACTIONS SPEAK LOUDER THAN WORDS

The majority of small businesses are likely to suffer financially if the owner were to die or have a long-term disability,.

Yet only...

20% have business life insurance, and...

18% have business disability insurance.

OUR PROCESS WILL HELP YOU IDENTIFY AND QUANTIFY YOUR GOALS AND GIVE YOU A WRITTEN PLAN.

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