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## Business Asset Protection Questionnaire

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When you own and run a business, money is something you worry about a lot. But worrying about your money and your assets is not the same as getting a good strategic grasp of how they can work for you. This brief questionnaire will help us help you look at the big picture. Take a few moments to complete it and send it back to us so we can help you plan for the future (and stop worrying so much).

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Your name:

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Adelman Katz & Mond aims to be our clients' most trusted business advisor. To earn that trust, we work hard to improve on our own expertise, which has been honed over 40 years. And to cover all the bases, we build successful collaborations with other professionals – including attorneys, bankers, investment managers and insurance brokers. We invite you to find out more about the benefits of having us as your most trusted business advisor.

	YES	NO	DON'T KNOW
Do you have any concerns regarding estate taxes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are all the legal documents in place for your exit strategy from your business (retirement, unexpected death, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you reviewed your exit strategy documents – such as buy/sell agreements – within the past year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you sure that your spouse would have sufficient income to live comfortably in the event of your death?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you ever worry about key employees leaving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever considered doing something special for your most valuable people?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is equal treatment for all your heirs after your death a concern?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you reviewed your retirement plan (IRA, SEP, 401(k), pension plan, etc.) within the past year to ensure that it is designed as effectively as possible for maximizing both benefits and deductions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you concerned about outliving your money in retirement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a possibility that your pension plan is overfunded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you leveraged all the tax benefits of purchasing life, health, disability and long-term care insurance through your business?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you confident that your business would survive if you were no longer running it yourself?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>