

BUSINESS SUCCESSION INSURANCE DISCUSSION PROMPTS



WHEN A BUSINESS OWNER EXITS UNEXPECTEDLY WITHOUT PROPER PLANNING

there can be a significant impact on a company and the family(ies) behind it. Life insurance can provide essential liquidity for buy/sell agreements and succession planning, helping protect both the business and the legacy it represents.

What are your long-term plans for business succession? Are your successors informed, prepared, and aligned with your succession plan?

Do you have a buy/sell agreement in place? If so, is it adequately funded to support the transition when needed?

If life insurance is funding your company's buy/sell agreement, when was it last reviewed to ensure the coverage and structure still align with your business needs?



DON'T LEAVE YOUR LEGACY TO CHANCE

Contact us to review your plan, identify potential gaps, and design solutions to help preserve your legacy for generations to come.