

PROTECT ASSESSMENT



Highlights

1. Shows business as an asset
2. Connects business to owner's personal plan
3. Identifies personal risk involved with business
4. Highlights red flags & high-risk areas
5. Demonstrates a wholistic view of business and owner needs

The Importance of Personal

The Protect Tool will quantify how the business asset fits within a business owner's personal financial position. The Tool identifies areas of risk for the owner as it relates to the business and begins to highlight the importance of the business asset to the financial future of the owner and their family. In 30 minutes, the Protect Tool uncovers details in a few key areas:

- In what capacity does the business support the well-being of the owner's family?
- Will the business owner be reliant on the business in some capacity to help fund their retirement?
- Does the business owner have a succession plan and/or buy-sell agreement in place?
- Are there any key employees that are crucial to the success of the business?
- How protected financially is the family in the event of an unplanned exit?

The Protect Tool gets to the heart of the issues that involve a business owner's personal risk. Protecting and growing your business not only helps your employees, customers, and communities - it helps secure the largest asset you have spent years building. Secure the wealth for your family into the future.