

Executive compensation

Complete for each executive, key employee or identified successor owner

Who?

Name: _____

Current position: _____ Current salary: _____

Age: _____ Retirement age: _____

Is this a candidate to whom you would potentially transfer the business? Yes No

Directional questions

What type of benefit makes sense? (check all that apply)

Death benefit protection Retirement income Long-term care

What is the primary motivation for exploring a special compensation strategy?

Type of benefit	Choose one option
Death benefit protection	<input type="checkbox"/> Providing a death benefit solely paid to the business upon key employee's death <input type="checkbox"/> Providing a death benefit solely paid to employee's beneficiary(ies) upon key employee's death <input type="checkbox"/> Sharing death benefit proceeds, where a portion goes to both the business and key employee's beneficiary(ies)
Retirement income	<input type="checkbox"/> Providing the employee tax-preferred income during retirement/providing the business a current tax deduction <input type="checkbox"/> Providing the employee current tax deferral/providing the business a future tax deduction
Long-term care	<input type="checkbox"/> Benefit the employee in case of long-term care need

The dollars to fund this strategy should come from: (check only one)

The business only Key employees only Mostly key employees

Which will better serve your key person retention efforts? (check only one)

Employee's perception of value in the benefit Golden "handcuff" or vesting schedule

Is it important for the business to recover some or all of the program costs in the future?

Yes No