

Prioritizing Business Needs

Process

This approach is simple to use and gives you the basic tools and resources you need to uncover sales opportunities.

Step 1: Setting the appointment

- Send the [Approach letter](#) (PDF) (BB10882) or [Approach email](#) (OFT) (LF519) to business owners that you'd like to meet with to get them thinking about financial planning needs they may have.

Step 2: Initial consultation

- Sit down with owners and use the [Business Owner Priority Checklist](#) (PDF) (BB9557) to start conversations by exploring their financial priorities with thought-provoking questions. If you want to gather additional information, use the more comprehensive [Prioritizing Business Needs Fact Finder](#) (DOC) (BB8718C).
- Another option available is the [Business Planning Review Checklist](#) (BB12457). These questions serve as a conversation guide with business owners as you review their needs.
- The [Business Life Cycle & Planning Brochure](#) (PDF) (BB11226) can be used in tandem with the checklist and fact finder to point out planning considerations based on where the business is in its life cycle.

Step 3: Offering potential solutions

- Show business owners we have a broad range of solutions to fit their needs using the [Business Solutions Chart](#) (PDF) (BB10565).

Not sure which solutions best fit the situation? These tools and resources can help determine possible solutions:

- For the business:
 - [Business Protection Decision Grid](#) (PDF) (BB11280)
 - [Business Succession Decision Grid](#) (PDF) (BB10262)
 - Key Employee Retention and Retirement Decision Grids:
[For C corps](#) (PDF) (BB11384) | [For S Corps /LLCs](#) (PDF) (BB11383) | [For Tax-Exempt Entities](#) (PDF) (BB11385)
 - [Key person calculator](#)

- For the employees:
 - Key Employee Retention and Retirement Decision Grids: [For C corps](#) (PDF) (BB11384) | [For S Corps /LLCs](#) (PDF) (BB11383) | [For Tax-Exempt Entities](#) (PDF) (BB11385)
- For the business owner's lifestyle:
 - [Business Owner Retirement Analysis Sample](#) (PDF) (BB11876) | [Request for Proposal](#) (DOC) (BB11879)
 - [Estate Tax Calculator Sample Output - Single Individuals](#) (PDF) (BB10045A) | [Estate Tax Calculator Sample Output - Married Couples](#) (PDF) (BB10045B) | [Request for Proposal](#) (DOC) (DD9031C)
 - [Disability insurance calculator](#)

Step 4: Requesting proposals

- After narrowing down the options, [request a proposal](#) for the specific solution that meets the needs of your client.

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