

Is your business protected?



As we discuss your disability insurance needs, I encourage you to take notes using this worksheet.

Planning area

Action item

> Income protection/benefit planning

Individual disability income (DI) insurance

Employer-provided disability insurance
(group long-term disability)

Supplemental individual DI insurance

> Retirement savings

DI retirement security

> Business protection

Overhead expense insurance

Business loan protection rider

Key person replacement insurance

> Exit planning

Disability buy-out insurance
