



# Buckman-Mitchell, Inc.

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## Financial & Insurance Services

### **BUSINESS NEEDS ANALYSIS CHECKLIST**

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| Yes | No | 1. If you or one of your key employees were disabled for a prolonged period due to an illness or accident would your/ their income continue?                     |
| Yes | No | 2. If you or one a key employee were to die unexpectedly it would probably create a financial hardship for your company. Have you provided for that contingency? |
| Yes | No | 3. If a key employee were to resign it would probably create a problem for your company. Do you have an incentive plan to discourage this?                       |
| Yes | No | 4. Do you have a buy-sell agreement in writing?  |
| Yes | No | -Has it been reviewed and updated since the last tax change?   |
| Yes | No | 5. In the last two years have you reviewed your plan to protect and provide for your family in the event of your death?  |

If you answered NO to any of these questions, you or your business may be at risk. Contact one of our licensed agents for more information at (559) 733-1181 on how we can assist you with the proper planning to help minimize or eliminate these risks.