MPAT: BUSINESS COMPLETE

Personal and Confidential

Strategic Risk Management Process

GENERAL INFORMATION

Name	
Address	
Date of Birth DD/MM/YYYY	Phone
Spouse's Name	Date of Birth DD/MM/YYYY
Child's Name	Date of Birth DD/MM/YYYY
Child's Name	Date of Birth DD/MM/YYYY
Child's Name	Date of Birth DD/MM/YYYY

EMPLOYMENT

My Occupation	Spouse's Occupation
☐Owner/Partner ☐Employee ☐Manager ☐Other	☐Owner/Partner ☐Employee ☐Manager ☐Other
Ownership Percentage (if applicable) %	Ownership Percentage (if applicable) %
Business Name	Business Name
Address	Address
Phone	Phone
Fax	Fax
e-mail	e-mail

FINANCIAL INFORMATION

Annual Income	Mine	Spouse's (If Applicable)
Under $50,000	☐	☐
$50,000 - $100,000	☐	☐
$100,000 - $250,000	☐	☐
Over $250,000	☐	☐

MY OPINIONS

Please check the one most appropriate to you:

Very important - VI   *Important - I*   *Not Important - NI*

	VI	I	NI
1. Wills and Will planning is	☐	☐	☐
2. Appointing Power of Attorney is	☐	☐	☐
3. Insuring our key people is	☐	☐	☐
4. I consider a good life insurance program to be	☐	☐	☐
5. On my death, my family's ability to maintain their standard of living is	☐	☐	☐
6. In the event of my death, paying off debt is	☐	☐	☐
7. Rewarding key people is	☐	☐	☐
8. Eventually passing my business to my child(ren) is	☐	☐	☐
9. If I cannot work due to sickness or disability, assuring an income is	☐	☐	☐
10. Retirement planning is	☐	☐	☐
11. Tax deferred investing is	☐	☐	☐
12. Buying out a shareholder on death is	☐	☐	☐
13. Estate planning to save tax is	☐	☐	☐

IN THE NEAR FUTURE

I plan to or expect to:

☐ Marry	☐ Buy-out a partner	☐ Receive inheritance
☐ Divorce	☐ Bring family into business	☐ Borrow money
☐ Retire	☐ Reorganize corporately	☐ Buy insurance
☐ Start a business	☐ Change firms	☐ Pay off a loan
☐ Expand a business	☐ Purchase property	☐ Write a will
☐ Sell a business	☐ Sell property	☐ Other (specify)

BUSINESS

Please check the one most appropriate to you:	Yes	No	Not Sure
1. I have outlined my financial plans on paper	☐	☐	☐
2. I know when I want to retire	☐	☐	☐
3. I know what capital I need to enjoy my retirement years	☐	☐	☐
4. I know how tax deferred savings can be used to my advantage	☐	☐	☐
5. My life insurance program is consistent with my retirement plans	☐	☐	☐
6. I carry personal disability or accident/sickness insurance	☐	☐	☐
7. Our business has a written business succession plan	☐	☐	☐
8. My life insurance is consistent with our business succession plan	☐	☐	☐
9. I have developed a tax effective estate plan	☐	☐	☐
10. I have a current, valid Will that is consistent with my estate plan	☐	☐	☐
11. I understand the full impact of how taxes will be applied to my estate	☐	☐	☐
12. My life insurance is consistent with my total estate plan	☐	☐	☐
13. I understand how trusts are used in estate planning	☐	☐	☐

HUB

I AM INTERESTED IN DISCUSSING

Please check the one most appropriate to you:	Yes	No	Not Sure
1. A review of all my existing insurance	☐	☐	☐
2. Ways to provide for my family in the event of death	☐	☐	☐
3. Insurance to pay off debt	☐	☐	☐
4. Creditor protection	☐	☐	☐
5. Supplemental executive compensation plans for key employees	☐	☐	☐
6. Supplemental executive compensation plans for business owners	☐	☐	☐
7. Ways to minimize income taxes	☐	☐	☐
8. Ways to reduce estate taxes	☐	☐	☐
9. Tools for family business succession	☐	☐	☐
10. Ways to pay me if I become critically ill	☐	☐	☐
11. Tools to extract retained earnings	☐	☐	☐
12. Tax efficient supplemental income for my retirement	☐	☐	☐
13. Estate planning	☐	☐	☐
14. Investments that are tax favored	☐	☐	☐
15. Charitable giving	☐	☐	☐
16. Buy-sell agreements for multiple shareholders	☐	☐	☐
17. Other (specify)	☐	☐	☐

PLANNER NOTES