

# Executive Benefit Planning

Presented by: **G Keith Stonestreet**  
Stonestreet Associates LLC



## Ask Yourself...

What would the impact on your business be if a *key employee started his/her own business or went to work for a competitor?*

Are you making effective use of business dollars to help achieve your *personal financial security objectives?*

### Objective:

*Reward and Retain Key Employees*

#### Issues to Consider:

- What is the value of your key employees to your business success?
- Do you have any selective benefit programs to assure the retention and loyalty of your key employees?
- What types of benefits are important to the people who are critical to your business?
- Are your current benefit plans meeting these expectations?

### Objective:

*Use Business Dollars to Help Satisfy the Owner's Personal Financial Security Needs*

#### Issues to Consider:

- If you had died or become disabled yesterday, would there be an adequate income to maintain your family's lifestyle today?
- Will you have the funds available to meet your education and/or retirement goals?
- Will your estate have sufficient liquidity to pay estate taxes and other settlement costs?
- Are you taking full advantage of business dollars to meet your personal financial security goals?