Financial Strategies

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Name

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Best contact number and time to reach you

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Preferred email

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Company Name

____
Address, City and Zip Code

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Occupation/Title

I'm interested in the following Strategies/Planning Tools:

Personal Planning

_ Tax Advantaged Retirement Planning
__ Tax Bracket Planning
__ Tax-Favored Retirement Savings
__ Not Outliving Income
__ Life Insurance Review/ Needs
__ Guaranteed Lifetime Income
__ IRA, 401K, 403B Payout Strategies
__ Inflation and Income Planning
__ Tax Free Retirement Income
__ Alternatives for Long Term Care

Business Planning

__ Executive Bonus
__ Business Continuation/ Succession
__ Key Employee Insurance
__ Business Valuation
__ Deferred Compensation
__ Owner Only Retirement Programs
__ Buy/Sell Agreement Funding
__ Business Protection/ Asset Protection
__ Non-Qualified Retirement Plans
__ Selective Employee Profit Sharing
__ Shifting Business Assets to Your Personal Balance Sheet on a Tax Favored Basis+

Estate/ Wealth Planning

__ Methods of Charitable Giving
__ Special Needs Planning
__ Minimizing Estate Taxes
__ Legacy & Estate Planning
__ Wealth Replacement Vehicles
__ Life Insurance Trust

Are you aware that your business may be able to help satisfy many of these personal planning priorities?

* Tax Free Distribution or Income are based on the use of partial surrenders and zero or low cost loans and policy structured within the MEC guidelines with the policy remaining in force! Kelm Financial Services Inc. does not provide legal advice nor tax calculations, preparation or advice. Consult with a licensed professional in that field for additional information.

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