Business Planning Overview

Conversations for every stage of your business growth

Growth

Business

planning

succession

Sell or liquidate

Retain in family

agreement

transition

Retirement

Management

Estate equalization

Successor training

Successor buy-sell

Power of attorney

income planning

Ownership transition

As your business moves through **survival**, **growth** and **maturity** stages, your planning focus will shift, as will the conversations you have with your advisor.

Survival

Personal planning

Risk management

Premature death

Will

Disability

Critical illness

Retirement planning

Registered plans

Asset allocation

Non-registered savings plans

Other savings goals

Children's education Home purchase

Tax minimization

Business continuation planning

Key person protection

Premature death Critical illness

Buy-sell agreement

Premature death

Retirement

Disability

Critical illness

Business

loan protection

Executive

benefit planning

Connect with an advisor to learn more about insurance for business owners.

Maturity

Estate planning

Will planning

Estate equalization Family law

Tax planning

Estate maximization Estate freeze Share redemption Liquidity

Trust planning

Family trusts Spousal trusts "Self-settled" trusts

Philanthropy

Planned giving



Life's brighter under the sun