

Stephen L. Friedman, CPA

BUSINESS INSURANCE AND PENSION PLAN QUESTIONNAIRE			
<i>Dear Client:</i>			
<i>In an effort to provide you with the best possible service on a <u>pro-active basis</u> and to ensure successful performance of your business in the future, we would like to ask you to complete this questionnaire. Please provide simple "Yes" or "No" answers to the following questions below and return this questionnaire to us upon completion. All answers will be treated in utmost confidence.</i>			
Company Name:			
Your Name:		E-Mail:	
Work Phone No:		Fax No:	
Cell Phone No:		Best Time To Call:	
Question		Yes	No
1. Do you have partnership insurance for the benefit of each partner to ensure that if one partner dies, the surviving partner/s will have enough money to pay out the family of the deceased partner to keep control of the business?			
2. Do you have business overhead protection insurance to ensure availability of funds for your business in case of your temporary disability?			
3. Do you have a defined contribution or defined benefit pension plan for your partners and employees to ensure their financial security in the future?			
4. Do you have key-man insurance for key employees within your organization to ensure the continuity of your business operations?			
5. Do you have property, casualty, mortgage and earthquake insurance for your business property to ensure the continuity of your business operations?			
6. Do you have product or professional liability insurance for your company, if required, to protect your business in case of a possible legal action?			
7. Do you offer life insurance coverage to your partners and key employees within your organization?			
8. Do you offer long-term care insurance coverage to your partners and key employees within your organization?			
9. Do you offer disability insurance coverage to your partners and key employees within your organization?			
10. Do you offer medical insurance coverage to your partners and key employees within your organization?			
11. Did you know that your organization could pay monthly premiums for tax-qualified pension and insurance plans on a pre-tax basis, thereby substantially decreasing the overall tax liability of your business?			
12. Did you know that cash values in tax-qualified pension and insurance plans can earn about 4-7 percent annual compound interest on a tax-deferred basis, thereby providing maximum financial benefit to the policy owners?			
13. Did you know that you can borrow money against the cash values in your insurance policies and some pension plans without any tax consequences?			
14. Did you know that you can offer important benefits to your employees, improve their motivation, reduce your company's tax liability and enable you to accumulate substantial tax-deferred savings – all at the same time?			
15. Do you realize the negative financial consequences of <i>not</i> having one of the above mentioned plans at the time when they may be needed?			
16. Would you like to know how your organization, partners and employees can benefit by having one or more of the above mentioned plans?			
Completed By:		Date:	