

# Take 3 Videos

## Powerful planning strategies for you and your estate or business

With Heather Davis and Greg Holmgren



### Protecting Your Business

How do businesses prepare for the sudden death of an owner and its impact

on customers, employees, lenders and suppliers?

<http://bit.ly/1QM5dZe>



### Tax Diversify Your Retirement Income

How do business owners build wealth for their own retirement while

trying to reduce the income taxes they have to pay?

<http://bit.ly/1eDHvNP>



### Protecting Your Family

How do business owners, whose families are financially dependent on income

provided by the business, protect their family's lifestyle in the event of their death?

<http://bit.ly/1LfRkxy>



### Business Asset Strategies

How do business owners prepare to unlock the value of their business so that

they give themselves the greatest chance of realizing its full value?

<http://bit.ly/1GigCWo>



### Protecting Your Partner

How do business owners deal with the void left by the unexpected death of

a business partner?

<http://bit.ly/1GigKFm>



### Retaining Management

How do privately held companies motivate and incentivize key employees to stay

long-term and contribute to the owners' overall success?

<http://bit.ly/1I9HMn6>



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**Building Cash**  
How do business owners build and maintain the cash they need to operate the business in a

prudent and tax-efficient manner?

<http://bit.ly/1LFT6z0>



**IRA Wealth Maximization**  
How do clients with large qualified plan and IRA plan balances prepare for the

potential depletion of those assets from taxes?

<http://bit.ly/1N0Vhop>



**Why Retain Employees?**  
How do medical practices identify the costs of high employee turnover and the

negative effect it has on revenues?

<http://bit.ly/1e6zDUI>



**How Can We Retain Employees?**  
How do medical practices reward and retain their key employees while

mitigating financial risk?

<http://bit.ly/1JlzIR6>



**Retirement**  
How do medical practices address the retirement concerns of their employees?

<http://bit.ly/1MtPOpV>

