

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/1e6zDUl>



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>

