

As a business owner, or self employed professional, you need to make sure you are prepared for now and for your future. Below are some questions to see if you or your business is prepared for all circumstances.

Yes No Don't Know NA

Retirement:

Do you have a 401K plan or annuity for retirement?

Is your retirement plan enough to stop working when you want to?

Do I need to provide 401K plans for my employees?

When you retire, will you have enough to cover high rising cost of living or any unforeseen issues (ie. new roof, new car, new appliances)?

Will your debt be eliminated before retirement?

Do you have a will?

Do you have an appraisal of the future value of your business?

Do you have an exit strategy?

Do you know what your life will look like during retirement?

Unforeseen Injury/Illness:

Is there a set plan to keep your business running if you get ill or injured and unable to work?

Will you be able to receive disability payments to keep afloat financially?

Insurance:

Will you be able to cover health care/insurance costs during retirement?

Do you have enough insurance if injured or sick?

Do you have insurance that covers your business and your family's future

General:

Are you growing your assets with low risk or worry?

Are you using sharing to much of your hard earned money with Uncle Sam?

Do you have an emergency fund?

If you answered "No" or "Don't Know" to any of the above questions, these may be areas to review. For more information on any of the questions, you can set up a free consultation with the calendar link below, or e-mail this form with your information and questions. E-mail form to: support@amwellagency.com

Please contact me via email or phone.

Name _____

Email _____

Phone _____

Click link below to set up free consultation chat:

<https://calendly.com/amwell/15min?month=2021-10>



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