

Benefits for Employees

All participants of the qualified plan will be entitled to have an overall financial review and analysis completed by our team at no additional charge. This analysis will entail review of the following:

- **Asset Protection:** Review disability insurance and life insurance needs in regard to current portfolio.
- **Estate Planning:** Evaluate all assets, liabilities and ownership positions in order to properly evaluate the estate and resulting estate tax consequences.
- **Legal Documents Review:** Review your wills, trusts and other documents related to your financial and estate plan.
- **Tax Analysis:** Analyze personal tax liabilities in order to take advantage of possible tax leveraged opportunities.
- **Investments:** Review current investment portfolios and goals in order to help you enhance performance and diversification opportunities.
- **Budgeting:** Track family expenses in order to determine best ways to allocate family income.
- **College Funding:** Explore options available to ensure college funding is taken care of in a tax efficient manner.
- **Education:** Utilize our quarterly planning topics and our complimentary educational seminars.

Benefits for Executives

Once a qualified plan is implemented with Family Financial Partners, executives will have access to the aforementioned employee planning services, as well as our executive planning services. We are committed to assisting executives and other highly compensated employees with their planning questions and concerns. Our planning team at Family Financial Partners will be available to assist these individuals in the following areas:

- **Asset Protection:** Review disability insurance and life insurance needs in regard to current portfolio.
- **Business Succession Planning:** Review business buy/sell agreements, deferred compensation, liabilities and overall business valuation and exit strategy.
- **Estate Planning:** Evaluate all assets, liabilities and ownership positions in order to properly evaluate the estate and resulting estate tax consequences.
- **Legal Documents Review:** Review your wills, trusts and other documents related to your financial and estate plan.
- **Tax Analysis:** Analyze personal tax liabilities in order to take advantage of possible tax leveraged opportunities.
- **Investments:** Review current investment portfolios and goals in order to help you enhance performance and diversification opportunities.
- **College Funding:** Explore options available to ensure college funding is taken care of in a tax efficient manner.
- **Education:** Utilize our quarterly review meetings and our complimentary educational seminars.

We do not provide legal, accounting, or tax advice, but we do coordinate our services and work together with our clients' professional advisors. Please consult your own professional legal, accounting, and tax advisors for information specific to your situation. We can also provide referrals.

FamilyFinancialPartners.com

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