

8 key questions for business owners

1. If you accumulate as many net assets in the next five years as you did in the last five years, will you be satisfied with your progress?

- Yes
- No
- I don't know. Let's discuss.

2. Is the difference between what you own and what you owe:

- Getting larger
- Getting smaller
- Staying the same
- I don't know. Please help me to identify the difference.

3. How many weeks of your typical month in retirement are fully funded by your current financial security plan (based on your date of retirement until end of your projected life expectancy):

- First week only
- Two weeks
- Three weeks
- All four weeks
- I don't know. Please help me find out

4. Does your current life insurance pay you immediately to stay at home on diagnosis of critical illness – or would you have to go to work while critically ill?

- Pays me to stay at home while recovering
- I would still have to go to work
- I have no idea. Please evaluate my situation with no obligation

5. Based on your current financial security plan, for how many of your children will you be able to fund post-secondary education:

- One child
- Two children

- Three children
- All of our children
- I have no idea. Please help me to determine at no expense.

6. What compensation do you receive from your company to remunerate you for the second signature you gave to your bank as personal guarantees?

- I draw maximum compensation
- I do not draw maximum compensation
- How do I draw this compensation and how much should it be? Please inform me.

7. For how long does your partnership agreement guarantee the salaries of directors in the event of serious illness or disability?

- One to three months
- Four to six months
- No provision's are in place, as far as I know. Please show me how to provide this protection.

8. Are your business partnership arrangements structured to leave your spouse with inflexible or unmarketable company shares instead of ready cash in the event of your critical illness, disability or death?

- He/she would only inherit shares.
- He/she would receive cash.
- He/she would have enough to maintain their current standard of living while maintaining their current employment.
- I have no idea. Please consult with me on this issue.

Carlos A. Rodrigues

Financial Security Advisor

905-561-5177, ext. 235 | Fax: 905-561-7418

carlos.rodrigues@f55f.com



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