



## BUSINESS PLANNING

## OWNER/ EXECUTIVE PLANNING

As a business owner, you've worked hard and often sacrificed much. You have put your own finances on the line. Now that your business is successful, are there benefits available just for you? Or for you and your key executives? Are there programs to help recruit and retain key executives?

The simple answer is yes, but using an inexperienced advisor can be risky and leave much on the table. Carillon Group works with executives and business owners to customize strategies based on your goals and objectives.

Have you ever asked what would happen to your business in the event of your unexpected death? Or your retirement? Or how about the retirement, death, or disability of key executives. Carillon Group can help you navigate these risks and life events. Our experience varies from start up businesses to financial planning for high-net-worth individuals and companies.

### Some planning areas include:

- Key Person Protection
- Supplemental Executive Retirement Plans (Deferred Compensation)
- Business Succession Planning
- Buy/Sell Planning
- Stock Redemption Planning
- Selective Executive Life Insurance
- Individual Disability Carve-Out Protection



Questions?  
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