

Contact Information:

Name(s) \_\_\_\_\_

Mailing Address \_\_\_\_\_

E-mail Address \_\_\_\_\_ DOB: \_\_\_\_\_

Spouse DOB: \_\_\_\_\_ Phone: \_\_\_\_\_

## Personalized Checklist

### Check Areas For Information And Periodic Updates

#### General Categories

- College Funding Options
- Tax Deferral, Reduction and or Elimination
- Qualified Retirement Plan Distribution Strategies
- Wealth Accumulation Strategies
- Providing Income Replacement For Your Family
- Maximizing Your Pension Or Retirement Plan Assets
- Estate and Wealth Preservation Strategies
- Generating Adequate Income For Your Lifetime

#### Business Owners/Entrepreneurs

- Business Continuation And/Or Succession Strategies
- Reducing Employee And Employer Taxes
- Generating Additional Post-Retirement Income
- Information On 401(k) And Other Retirement Plan Options
- Techniques For Allowing My Business To Pay My (The Owner's) Personal Life Insurance
- Information On Ways To Create And Fund Company Buy-Sell Arrangements
- Information On Benefit Enhancement Packages For Select Key Employees That Can Increase
- Loyalty And Retention

#### Product Information

- Life Insurance Information And Analysis
- Tax Deferred Annuities\*
- Income Annuities\*
- Long Term Care Insurance
- Disability Insurance\*\*

\*Issued by New York Life Insurance and Annuity Corporation.

\*\* Products available through one or more carriers not affiliated with New York Life Insurance Company, dependent on carrier authorization and product availability in your state or locality.

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