Disability planning for business owners

Use this sheet to prepare a conversation with your appropriately qualified professionals. Write down the decision you want to make and what information is still missing.

01 Which household and business costs continue if I stop working?

02 Who can legally make decisions, and who has the experience and access to carry them out?

03 How do existing policies define disability, and what happens during a partial return?

04 Does the ownership agreement line up with the timing and conditions of its funding?

05 What would cause us to move from temporary support to a succession discussion?

LEAVE WITH AN AGREED NEXT STEP

Decision / information needed: _____

Person responsible: _____ Review date: _____

General education only. This is not individualized investment, tax, legal or insurance advice. No advisor relationship or introduction is created by using this sheet. Confirm the scope and responsibilities with each professional.