

Avoiding Business Planning Mistakes Using Life and Disability Insurance and Other Techniques



Thursday, May 23, 2019

40 Pacifica, 15th Floor
Irvine, CA

6:00 pm - 6:30 pm Networking & Wine Reception
6:30 pm - 8:00 pm Presentation

Speaker: Derek K. Early

Please join us for a discussion of mistakes that business owners often make that can have disastrous consequences. We will view six short videos that dramatize the mistakes and their consequences and then identify strategies to help business owners avoid them. This is a great opportunity to bring your client and start a conversation about issues and opportunities related to their planning. The seminar will examine practical considerations such as:

- Buy-Sell Agreements: Why you need one and common mistakes by those that have one
- Business Succession Planning: Why it is necessary and how to get started
- Disability: What's the risk and how should business owners plan for it
- Exit Planning: Tips for optimizing the chances for a successful transition

Earn 1 hour of Insurance & 1.5 hours of CFP credit

RSVP to (949) 453-2900



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