

80/20 Estate Planning  
Host – Albert E. Gibbons

Tape # 8

***Guests:***

Michael P. Haney, Esq. – Haney & Hecht  
Brian K. Titus, JD, LUM, CLU, ChFC – Phoenix Life

***Topic:***

**Business Owners**

***Outline:***

What are some of the questions that a business owner should ask himself when thinking about this process?

Why do business owners to often not ever get to this planning?

How can we get the business owner to realize how very important that this planning is?

Will there ever be a perfect plan, or will this be an ongoing effort?

How do you empower a business owner to start this process, and to follow it through?

How can trusts be used to enhance the planning?

What are our options for planning for premature death?

What is a Buy/Sell Agreement?

How is Life Insurance used in Buy/Sell Agreements?

What are the different kinds of Buy/Sell Strategies?