

Smart

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GET THE
"BIG PICTURE"
ON YOUR
FAMILY'S FINANCES

We've seen what can happen to our nest eggs in a matter of months.

An advisor from Mensh Insurance can help you family protect your income and wealth.

If you're worrying about "what can happen" and still don't have a plan -- it's time to talk.

Give us a call or e-mail us today.

HAVE QUESTIONS?

Just ask.

What kind of CEO are you for your own "Family Corporation?" 20 questions.

YOUR NAME: _____

1. Do you have Life Insurance for yourself? Yes. No.
2. Does your spouse have Life Insurance? Yes. No.
3. Do you have Long Term Care Insurance? Yes. No.
4. Can you afford to pay for Long Term Care without Insurance? Yes. No.
5. Do you know if you have enough life insurance/savings/investments to pay off your mortgage if you die unexpectedly? Yes. No.
6. Do you know if you have enough Life Insurance/savings/investments to send your kids through college if you should die unexpectedly? Yes. No.
7. Does everyone in your family have health insurance? Yes. No.
8. Do the college students in your family and children that have left home within the last 3 years have health insurance? Yes. No.
9. Do you have disability insurance through your employer? Yes. No.
10. Have you ever asked your HR person how much your disability insurance would really pay per month to cover your salary if you actually had to use it? Yes. No.
11. Have you told your family members and the executor of your will where to find your important paperwork and given them a copy? Yes. No.
12. Do your parents have a plan in place for their long term health care needs? Yes. No.
13. Are your parents going to expect you to pay for their retirement home? Yes. No.
14. Have you actually asked your parents about their finances? Yes. No.
15. Can you write a check for \$6,000 of nursing home care every month starting this month? Yes. No.
16. Have you updated your will to reflect the latest developments in your life? Yes. No.
17. Do you pay your insurance premiums on time? Yes. No.
18. Do you talk to your Insurance Advisor once a year? Yes. No.
19. Do you feel that you have a solid financial plan in place for your family? Yes. No.
20. Can you pay off your credit card bills in full right now? Yes. No.

NUMBER OF "YES" ANSWERS ____ NUMBER OF "NO" ANSWERS ____

*mensh*INSURANCE

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Check your Score as CEO:

IF YOU HAD 20 “YES” ANSWERS, CONGRATULATIONS.

You are doing an excellent job as CEO of your Family Corporation. Your “stock holders” (family members) applaud you for your excellent preparation. Continue to stay on top of your Investment Portfolio. Continue to work with your Insurance Advisor. Good job.

Grade: A

IF YOU HAD 17-19 “YES” ANSWERS, YOU DID WELL.

You have worked hard to lead your “Family Corporation.” You have prepared for the future and yet, there may be a couple of holes in your Insurance Plan. Meet with your Insurance Advisor immediately to talk about how to close the gaps so you can complete your full protection program. Overall, good job.

Grade: B

IF YOU HAD 12 - 16 “YES” ANSWERS, YOUR “FAMILY CORPORATION” MAY BE HEADING TOWARDS TROUBLE.

Your score indicates that there are many holes in your Family Corporation protection program. As CEO, it’s time for you to take charge by talking to your Insurance Advisor immediately. Caution: do not wait to take further action. You may be seriously at risk if something unexpected happens in the future.

Grade: C

IF YOU HAD 11 OR LESS “YES” ANSWERS, YOU MAY NEED TO START LOOKING FOR A NEW POSITION.

As the CEO of your Family Corporation you are not taking steps to protect your family. You can resolve your problems and lead your Family Corporation back into a position of strength by calling your Insurance Advisor today and having a serious talk about long range planning and your goals for the future. Don’t worry about the past -- start looking towards the future and protect your income now.

Grade: F