

FA: _____

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SPLIT FUNDED DEFINED BENEFIT PLANS

Client Check List

Which of my current clients own a successful small business with a consistent profitable history, that has fewer than 50 employees, and . . .

- A** Is highly compensated, and consistently complains about their tax liability each year
- B** Is frustrated with the contribution limits to their current defined benefit plans- and would like to contribute substantially more (\$150,000 or more annually)
- C** Professional practice partners looking for larger business tax deductions
- D** Looking for potential retirement asset protection from creditors
- E** Law firm or medical practice looking for a strategy to retain and/or attract new partners
- F** Previously explored a defined benefit plan but decided against it due to high employee costs and/or perceived inflexibility
- G** Looking for a potentially tax-deductible way to fund a buy/sell agreement
- H** Receives earned income for sitting on boards of companies and/or receives Board of Director Fees

Please list the client names that fit the descriptions above, and that you plan to contact.

Client Name	Profile Letter(s)

Your Mercury Planning Specialist has the expertise to help you identify opportunities among your current book of clients. Reach out to Mercury at 877.842.1212, or email us at info@emercury.com