

ESTATE AND BUSINESS SUCCESSION PLANNING

Federated Life®

One of the most important plans you can make is for the smooth transfer of your business to the next generation. Federated can help you achieve your goals with specialized risk management support.

Estate Planning

A few simple planning techniques can help ensure you leave a lasting legacy as you desire.

- Make certain what you have goes to who you want, when you want, and how you want.
- Avoid the delay, publicity, and cost of probate in the event of death or disability.
- Protect your heirs from their inability, disability, creditors, and “predators.”
- Leave a lasting legacy to charity.

Succession Planning

Due to lack of proper planning, only 12 percent of family businesses survive to a third generation.†

- Proper planning means peace of mind today, knowing your desires for the future of your business will be fulfilled tomorrow.
- Getting the full value for your business is a major step in business succession planning. Federated can provide a Business Valuation Estimate for you, based on several different valuation methods.
- Proper planning ensures the legacy of your business will continue.

Federated can provide:

- A professional, team approach to effectively assist you with your estate and business succession plans.
- Specifically designed life insurance products to fund planning needs.
- Home Office expertise to work with you, your Federated representative, and your professional advisors.

A network of independent estate planning attorneys is available to assist in the estate/business continuation planning process.



Contact your local Federated Marketing Representative or scan the QR code to request additional information about business succession and estate planning support from Federated Insurance®.

IEC Foundation
Independent Electrical Contractors Foundation

† Joseph Astrachan, Ph.D., editor, *Family Business Review*, Family Firm Institute

This overview is for general information only. The contents should not be construed as legal advice or opinion. If you have any questions, you are urged to contact a lawyer concerning your specific legal situation.

It's Our Business to Protect Yours
FEDERATED
INSURANCE®

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Federated Life Insurance Company • Federated Reserve Insurance Company* • Granite Re, Inc.*†

*Not licensed in all states. †Granite Re, Inc. conducts business in California as Granite Surety Insurance Company.
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