

THE
FAMILY & BUSINESS PROTECTION
SCORECARD™



Our Worthy Ideal
is to inspire and guide
families to protect themselves from
life's uncertainties, to safeguard
and grow their wealth so they have
the freedom to enjoy life
with financial clarity
and confidence.


The Stakes
Are High!

Are You Properly Protecting
What Matters Most?

THE FAMILY & BUSINESS PROTECTION SCORECARD

Are You Properly Protecting What Matters Most?

Invest 90 Seconds To Be Certain!

| Critical Family Components | Evaluating Your Level Of Protection | Rate Your Current Planning 1 (Least) – 5 (Best) | | What Does Your Score Mean? |
|--|--|--|-----------------|---|
| Assets Protected From Damage & Lawsuits | Our auto, home and liability insurance coverages are designed to fully protect all of our assets. | | | <p>If you are scoring a 4 or 5, more than likely you are fine. But it still makes sense for an annual review to be sure everything stays correct.</p> <p>If you are scoring a 3 or below in any area, it is imperative that you seek immediate attention. You, your family and/or your business could suffer unreparable damage if something unforeseen were to occur.</p> |
| Current & Future Income Properly Guaranteed (Protected) | Our income is fully protected in the event of becoming sick or injured and unable to work. | | | |
| Wills, Trusts & Complete Estate Planning Documents | All of our legal documents are up to date and reflect our current wishes. All aspects of our estate planning are structured correctly and properly coordinated. | | | |
| Current & Future Family Security & Life Insurance | We have the ideal amount and types of life insurance to permanently safeguard the family. We are well positioned to maximize our retirement and still leave a legacy for the family. | | | |
| Essential Business Components | | | | |
| Key Employees | I have protected the company against the loss of key employees while also incentivizing them. I have a plan in place to tie them to the company for the long term. | | | <p>All Progress Begins With A Conversation.</p> <p>info@hdci.biz 516.677.6208 - www.hdci.biz</p>  <p>HOCHHEISER, DEUTSCH & Company Inc. <i>Helping to Secure Your Lifestyle and Your Legacy</i></p> |
| Business Continuity Succession & Exit Plan | We have a comprehensive business continuity, succession and exit plan. All partners' interest are fully protected while maximizing our business value. | | | |
| Name: | Date: | Total Score | Initials | |