



WizdomFinancial Advisors LLC • WizdomTree Benefit Solutions Inc.
WizdomTower Risk LLC • WizdomCare Senior Solutions LLC

Benefits Guide

Recruit, retain, reward, and retire top personnel using employee and executive fringe benefits.

Phase 1. Start Up

Group Medical Plan
Basic Group Life Insurance
Buy-Sell Agreement
Key Person Insurance
Business & Workers Compensation Insurance

Phase 2. Growth and Expansion

Group Disability Insurance
Salary Continuation
Increased Group or Individual Life Insurance
401(k), SIMPLE, SEP IRA
Umbrella Liability Coverage

Phase 3. Continued Growth and Maturity

Executive Bonus Life Insurance Split Dollar Life Insurance
Advanced Estate & Financial Planning for Key Employees
Qualified Pension & Profit Sharing Plan
Non-Qualified Deferred Compensation Plan
Stock Options/Phantom Stock Plan
Risk Management Services

Phase 4. Transfer of Management and Control

Gifts of Stock to Family Members
Recapitalization and/or Reorganization
Employee stock ownership plan (ESOP)
Merger, Acquisition, or going public
Key Person Retirement
Business Medicare Services Program

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