

# PEACE OF MIND FOR A 1099

*self employed health & wealth self assessment*

Give yourself 10 points for each statement you know is true.

<input type="checkbox"/>	My life insurance will annually pay me tax free income when I retire
<input type="checkbox"/>	My life insurance will pay me while I am alive if I have a chronic, critical, or terminal illness
<input type="checkbox"/>	My life insurance is building cash value that I can borrow against to grow and invest in my business with quick access to funds
<input type="checkbox"/>	My life insurance will help me pay less in taxes
<input type="checkbox"/>	My life insurance premium is not just an expense I hope I never have to use
<input type="checkbox"/>	My health plan pays me to go to the doctor and encourages preventative medicine BEFORE I get sick
<input type="checkbox"/>	My health plan rates are locked in until the age of 65
<input type="checkbox"/>	My health plan does not have a large deductible, a co-pay, or unknown coverages
<input type="checkbox"/>	My health plan provides for counseling, elective procedures, fertility treatments, orthodontics, vision, dental, Rx, ER & even my pet's health

Flip over for the bonus!



# LIFE INSURANCE IS NO LONGER JUST A NECESSARY EXPENSE

We've been there. "Buy term, invest the difference" was what made the most sense to us as small business owners for a long time...until it didn't. Gone are the days of policies that simply pay out when you die. With technology providing so many more data points, insurance companies are able to provide products that really do provide protection, growth, affordable rates, enhanced quality of life, and of course, peace of mind. Want to know what else they can do for small business owners?

- Employee Retention
- Tax Mitigation
- Succession Planning
- Building Your Own Bank

## GET YOUR BONUS POINTS!

Schedule your first meeting with us by texting "1099" to 817.859.7889 or just give a call at the same number. We will start with a quick 15 minute call to get some basic information and then we'll put together options based on your needs. You'll be able to see all of the different companies, products, and plans. THEN, you can choose which one best fits you. Best of all, our services are paid by the carriers we work with, and not you. Schedule your first call and don't get left behind.



**NATAN LIFE**

*Where creativity finds common sense*

## How did you score?

**0-40** You're in good company. This is where most business owners are when we first start working with them. You owe it to yourself and your family to make sure that you're protecting the investment you're making into your business and your family. We will bump that score to 100 when you request your Financial MRI with us so that you can start answering YES.

**40-60** We are impressed! Based on our experience you're ahead of the curve but it is probably something that you haven't reviewed in a while. Request a simple Financial X-ray with us and find out how answer YES to the ones you missed.

**60+** Are you in the industry? We aren't calling you a unicorn, but we don't come across too many high scores. We know your type though and you don't settle for less than perfect. Request your Adjustment with us to see how you can answer YES to all assessment questions.