

**QUESTIONNAIRE**

**Executive compensation**

**Key question:**

Have you created strategies to recruit, reward and retain key employees?

(complete for each executive)

**Executive**

Name: \_\_\_\_\_

Current position: \_\_\_\_\_ Current salary: \_\_\_\_\_

DOB: \_\_\_\_\_ Retirement age: \_\_\_\_\_

Is this executive a candidate to whom you would potentially transfer the business?  Yes  No

**Directional questions**

**What type of benefit for the executive?** (check all that apply)

Death benefit protection  Retirement income  Long-term care

**What is the primary motivation for exploring an executive compensation strategy?**

Type of benefit	Choose one option
<b>Death benefit protection</b>	<input type="checkbox"/> Providing a death benefit solely paid to the <b>business</b> upon key employee's death <input type="checkbox"/> Providing a death benefit solely paid to <b>employee's beneficiary(ies)</b> upon key employee's death <input type="checkbox"/> Sharing death benefit proceeds, where a portion goes to <b>both</b> the business and key employee's beneficiary(ies)
<b>Retirement income</b>	<input type="checkbox"/> Providing the employee tax-preferred income during retirement/ providing the business a <b>current</b> tax deduction <input type="checkbox"/> Providing the employee current tax deferral/providing the business a <b>future</b> tax deduction
<b>Long-term care</b>	<input type="checkbox"/> Benefit the employee in case of long-term care need

**The dollars to fund this strategy should come from:** (check only one)

The business only  Key employees only  Mostly key employees

**Which will better serve your key executive retention efforts?** (check only one)

Employee's perception of value in the benefit  Golden "handcuff" or vesting schedule

**Is it important for the business to recover some or all of the program costs in the future?**  Yes  No

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