

THE PERIODIC TABLE OF BUSINESS PLANNING ELEMENTS

401 (k) Plan	401 (k) Shadow Program	Key Metric Measurement Program	Identifying Niches	Family Limited Partnership	Shareholders Agreements	Factoring Companies	Management Buyout
Cross Tested Profit Sharing Plan	Non Roth IRA Roth IRA	Client Profitability Measurement	ESOP Recapitalization	Domestic Captive Insurance	Risk Management Audit	Non-Funded SERP	Stay Bonus
Defined Benefit Plan	Open Book Management	Product Line Profitability Measurement	Preferred Stock Recapitalization	CRT with C Corporations	Health Savings Accounts	Purchasing Companies	Key Employee Bonus Program
Combined Profit Sharing and Defined Benefit	Total Quality Control	Client Marketing to AAA Clients	Corporate Recapitalization	NIMCRUT Planning	Domestic Asset Protection	Golden Handcuffs	Passive Investment Strategies
Funded SERP	Key Metric Bonus Program	Identifying Intellectual Property	Asset Based Borrowing	International Captive Insurance	International Asset Protection	Recapitalization and Flip	Hedge Funds
Commercial Real Estate Ownership	Bonus Compensation Design	Sales Metrics and Controls	Mezzanine Debt Structure	C and S Corporation Combinations	S ESOP	Family Business Constitution	Direct Real Estate
Private Placement Life Insurance	Non ESOP/ ESOP Plan	Sales People Compensation	Managing Taxes in C Corp Sale	Family Business Transition	Tax Management of Internal Sale	3rd Party Sale	Asset Allocation Strategies

 Financial planning / Retirement	 Value creation in the business	 Financial and capital structure	 Tax and wealth transfer planning
 Asset protection / Risk management	 Exit planning	 Harvesting financial value	 Investment management