

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: _____

Age: _____ 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
Death benefit protection	<input type="checkbox"/> Providing a death benefit solely paid to the business upon key employee's death <input type="checkbox"/> Providing a death benefit solely paid to employee's beneficiary(ies) upon key employee's death <input type="checkbox"/> Sharing death benefit proceeds, where a portion goes to both the business and key employee's beneficiary(ies)
Retirement income	<input type="checkbox"/> Providing the employee tax-preferred income during retirement/providing the business a current tax deduction <input type="checkbox"/> Providing the employee current tax deferral/providing the business a future tax deduction
Long-term care	<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

Please keep in mind that the primary reason to purchase a life insurance product is the death benefit.

Life insurance products contain charges, such as Cost of Insurance Charge, Cash Extra Charge, and Additional Agreements Charge (which we refer to as mortality charges), and Premium Charge, Monthly Policy Charge, Policy Issue Charge, Transaction Charge, Index Segment Charge, and Surrender Charge (which we refer to as expense charges). These charges may increase over time, and these policies may contain restrictions, such as surrender periods. Policyholders could lose money in these products.

The non-public information you provided in this factfinder may be stored and used by the financial professional and/or to help develop a recommendation and create a profile for you, the consumer. The values contained in this document are provided and confirmed by you, the consumer. This document is not a statement or a guarantee of account values. Any inaccuracies within this document may impact the recommendation provided to you.

This information should not be considered as specific tax or legal advice. You should consult your tax or legal advisor regarding your own specific tax or legal situation.

This is a general communication for informational and educational purposes. The information is not designed, or intended, to be applicable to any person's individual

circumstances. It should not be considered investment advice, nor does it constitute a recommendation that anyone engage in (or refrain from) a particular course of action. If you are seeking investment advice or recommendations, please contact your financial professional.

Insurance products are issued by Minnesota Life Insurance Company in all states except New York. In New York, products are issued by Securian Life Insurance Company, a New York authorized insurer. Minnesota Life is not an authorized New York insurer and does not do insurance business in New York. Both companies are headquartered in St. Paul, MN. Product availability and features may vary by state. Each insurer is solely responsible for the financial obligations under the policies or contracts it issues.

Securian Financial is the marketing name for Securian Financial Group, Inc., and its subsidiaries. Minnesota Life Insurance Company and Securian Life Insurance Company are subsidiaries of Securian Financial Group, Inc.



PREPARE
PROTECT
SECURE

[securian.com](https://www.securian.com)

400 Robert Street North, St. Paul, MN 55101-2098
©2024 Securian Financial Group, Inc. All rights reserved.
F79732-3 Rev 12-2024 DOFU 12-2024
3988588