



COORDINATED
PLANNING



Planning workbook

Strong Communities Through Private Ownership

Strategic Solutions

Financial Planning

- Business Continuity and Succession Planning
- Exit Planning
- Key Employee Retention Planning
- Executive Benefit Planning
- Holistic Personal Financial
- Planning Farm Transition and Estate
- Equalization Planning
- Tax Mitigation Planning
- Estate Planning
- Gift and Charitable Tax Planning

Insurance

- Term and Permanent Life Insurance
- Corporate Insurance
- Business Buy / Sell Agreements
- Key Person Insurance
- Simplified Life Settlement Auction
- Disability and Long-Term Care Insurance
- In Force Policy Review Audits

Investment

- Managed Accounts
- Mutual Funds / ETF's / Stocks / Bonds / Variable Annuities
- Fixed Annuities / CD's / Treasuries

Retirement

- 401(k) and Profit Sharing Plan Development and Implementation
- Cash Balance Pension Plans
- SIMPLE IRA Plans
- SEP IRA Plans
- Traditional IRA
- ROTH IRA



Please complete this fact finder in its entirety.

The foundation for a good plan is accurate and complete information. Without it, the plan will be flawed and may fail at the very time it is needed. So while you may wonder why we need a particular piece information, this list is based on our years of experience and is the key to accounting for all the unique characteristics of your operation.

Your Planning Team

Are you currently working with an accountant?

If yes, CPA name: _____

☐ Yes

☐ No

Are you currently working with an attorney?

If yes, attorney name: _____

☐ Yes

☐ No

Are you currently working with a lender?

If yes, lender name: _____

☐ Yes

☐ No

Family information

First Name	Last Name	Date of Birth
Social Security Number	Drivers License #	Drivers License Expiration
Height	Weight	Marital Status
Email	Phone	
Address		
Occupation	Employer	

First Name	Last Name	Date of Birth
Social Security Number	Drivers License #	Drivers License Expiration
Height	Weight	Marital Status
Email	Phone	
Address		
Occupation	Employer	

Children - please indicate if blended family

First Name	Last Name	Date of Birth	Spouse
First Name	Last Name	Date of Birth	Spouse
First Name	Last Name	Date of Birth	Spouse
First Name	Last Name	Date of Birth	Spouse
First Name	Last Name	Date of Birth	Spouse

Living Parents

First Name	Last Name	Date of Birth	Spouse
First Name	Last Name	Date of Birth	Spouse

Goals - rank all that apply in order of importance

Personal Goals

Rank	Goal
	Pay off debt
	Save money for retirement
	Reduce income taxes
	Expand the farm/ranch operation
	Transition the farm/ranch to _____ desired time frame _____
	Train someone to take over the farm/ranch
	Provide for a family member's education
	Protect the farm/ranch from divorce, creditors and/or family disputes
	Review investment portfolio
	Provide for surviving spouse and/or heirs in the event of death or disability
	Minimize estate settlement costs, publicity and time to close estate
	Successfully invest and manage the taxation and use of a windfall
	Plan for long-term care costs
	Minimize estate and inheritance taxes

Estate Planning Goals

Rank	Goal
	Avoid probate
	Restrict the disposition of certain assets
	Provide financial support to my beneficiaries
	Reduce estate/inheritance taxes
	Leave a benefit to charity
	Provide a legacy to my heirs
	Ensure farm remains in family

Business Goals

Rank	Goal
	Pay off debt
	Reward and retain key employees
	Reduce income taxes
	Transfer ownership in the most efficient manner
	Protect against the loss of a key person
	Align business planning documents with goals and objectives
	Maintain the farm operation for generations to come
	Set up a benefits program for myself or key employees
	Establish a retirement plan for your business
	Review existing business structure

Additional Goals

[illegible]

Concerns

[illegible]

Case Summary

Please provide a description of your farm/ranch operation (background, who's involved, family dynamics, etc.).

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

What estate planning documents do you currently have?

Last will and testament (if yes, please provide a copy)	<input type="checkbox"/> Spouse 1	<input type="checkbox"/> Spouse 2
Trust agreement (if yes, please provide a copy)	<input type="checkbox"/> Spouse 1	<input type="checkbox"/> Spouse 2
Power of attorney	<input type="checkbox"/> Spouse 1	<input type="checkbox"/> Spouse 2
Health care directives	<input type="checkbox"/> Spouse 1	<input type="checkbox"/> Spouse 2

What would you like to happen to your business at your death?

Spouse 1:

Spouse 2:

How would you like the remainder of your estate to be divided at your death?

List any specific gifts/bequests you would like to make to your beneficiaries/charity:

Will your spouse have the financial resources to maintain the same lifestyle if you were to pass away?

Spouse 1 ☐ Yes ☐ No ☐ Not sure

Spouse 2 ☐ Yes ☐ No ☐ Not sure

Do you want to provide for special family goals or needs (e.g., college, travel, charity, disabled child, dependent parent, addictions, divorce, bankruptcies, etc.)? If yes, please explain:

Do you have any business entities associated with the farm?

☐ Yes ☐ No

If yes, please complete the "Entity Information" below & provide 2 years' tax returns and a balance sheet for each business

Entity Information

Business Name: _____

EIN #: _____ Established Date: _____

Business Type: ☐ Limited liability company, taxed as a:

☐ Sole Proprietorship ☐ Partnership ☐ S Corporation ☐ C Corporation

Who are the current owners of the business? _____

Have you established any governing documents for this entity, i.e., bylaws, operating agreement, etc.?

☐ Yes ☐ No ☐ Not sure

Do you have a written buy/sell agreement in place?

☐ Yes, attach details ☐ No ☐ Not sure

Have you established a retirement plan through your business(es)?

☐ Yes, attach details ☐ No ☐ Not sure

☐ *Please check if you would like additional information about retirement plan options.*

How will your role(s) in the operation change over time?

What would you like to happen to your farm operations upon your death, disability or retirement?

What would you like to happen to your farmland/real estate when you are gone?

What will need to happen for future generations to be successful (if applicable)?

Concerns:



Thank you for taking the time to complete these forms and gather the needed documents. We know it's a lot of work, but thoroughness now helps us develop the most detailed, accurate plan to meet your unique goals. We will work closely with you to deliver the best possible plan.

Securities offered through Valmark Securities, Inc. Member FINRA, SIPC. Investment Advisory Services offered through Valmark Advisers, Inc. a SEC Registered Investment Advisor 130 Springside Drive, Suite 300 Akron, Ohio 44333-2431 1-800-765-5201. Coordinated Planning is a separate entity from Valmark Securities, Inc. and Valmark Advisers, Inc. Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP® in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Coordinated Planning Team



Brandon Dirkschneider CFP®, CAP®, FSC, CLTC

Chief Executive Officer | 402.505.9341 | brandon@coordplan.com

Brandon serves as the guiding force behind our financial planning firm, charting the course towards financial prosperity for our clients and ensuring our team's unwavering commitment to excellence. He is dedicated to helping clients achieve their financial goals with what we believe is unparalleled industry insight.



Adam Bailey

Director of Business Development | 531.710.4751 | adam@coordplan.com

Adam is a strategic leader responsible for driving growth and expansion opportunities for our organization. As a seasoned professional, he is working to spearhead initiatives to enhance revenue streams, foster long-term client relationships, and position our company as a market leader.



Chase Weaver CFA®, CFP®, RSSA®

Director of Business Operations | 531.710.4750 | chase@coordplan.com

Chase oversees the day-to-day business operations of our company. He plays a pivotal role in aligning operational activities with the overall business strategy and facilitates the smooth function of the organization. He also chairs our in-house investment committee.



Cindy Bojanski CFP®, RICP®

Financial Advisor | 492.452.3402 | cindy@coordplan.com

Cindy is a seasoned adviser who can be your compass to financial success. She can provide insights, personalized strategies, and a clear roadmap to assist in securing your financial future. She can help you make informed decisions to work toward achieving your goals with confidence.



Jared Knobbe CFP®

Financial Advisor | 531.710.4753 | jared@coordplan.com

Jared provides guidance, tailored strategies, is committed to your financial well-being. He can empower you to make informed decisions to assist in turning your financial goals into reality. Jared works hand in hand with our advisors to design a plan for you and your family.



Kris Mrsny

Insurance Division Manager | 402.505.9338 | kris@coordplan.com

Kris oversees the insurance division within our organization. With her experience in insurance operations, she can ensure exceptional customer service while working closely with our insurance providers to monitor policy performance, service, and new business.



Emma Baker

New Business Insurance Manager | 402.614.2523 | emma@coordplan.com

Emma is your strategic ally, meticulously navigating the complex landscape of the insurance process. With a commitment to seamless service, she helps streamline your application process, underwriting, and policy delivery.