
**BETTER
BUSINESS**



**BETTER
LIVING**

YourBiz by **Synergy** CREDIT UNION

www.synergycu.ca/YourBiz

Better business. Better living.

Now you can have both – with Synergy's YourBiz program for business owners and ag producers.

TO DO: YourBiz Checklist

	TAKEN CARE OF	NEEDS CLOSER INSPECTION
Cover short-term needs and obligations	<input type="checkbox"/>	<input type="checkbox"/>
Explore ways to reduce taxes	<input type="checkbox"/>	<input type="checkbox"/>
Develop up-to-date business plan and keep current	<input type="checkbox"/>	<input type="checkbox"/>
Plan for growth	<input type="checkbox"/>	<input type="checkbox"/>
Attract, retain and reward employees and prepare for unforeseen turnover	<input type="checkbox"/>	<input type="checkbox"/>
Create strategies for debt and capital management	<input type="checkbox"/>	<input type="checkbox"/>
Plan for succession and business continuation	<input type="checkbox"/>	<input type="checkbox"/>
Put partnership/shareholder agreement(s) into place (ie. buy-sell, disability, and retirement)	<input type="checkbox"/>	<input type="checkbox"/>
Determine a tax-effective strategy for retirement income	<input type="checkbox"/>	<input type="checkbox"/>
Protect loved ones against the possibility of your death, disability, and/or critical illness	<input type="checkbox"/>	<input type="checkbox"/>
Prepare an up-to-date and tax-effective will and estate plan	<input type="checkbox"/>	<input type="checkbox"/>
Ensure ability to meet corporate financial obligations, such as a mortgage or business loan	<input type="checkbox"/>	<input type="checkbox"/>
Examine personal financial plan considerations	<input type="checkbox"/>	<input type="checkbox"/>

Other? _____

We can help. Synergy Credit Union, in partnership with Credential Wealth Management, offers the tools and expertise to work with you and your commercial or ag business to advise you on targeted, focused strategies to improve your bottom line – and your peace of mind.

Book a Synergy YourBiz consultation today!

1-866-825-3301

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management