

FORMING OUR FUTURE

Leadership Conference

MARCH 6-9, 2024 | ORLANDO, FL

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Executive Benefits – Not Just For Executives Anymore!

Lee Bissmeyer & Steve Utsler
Principal Financial Group

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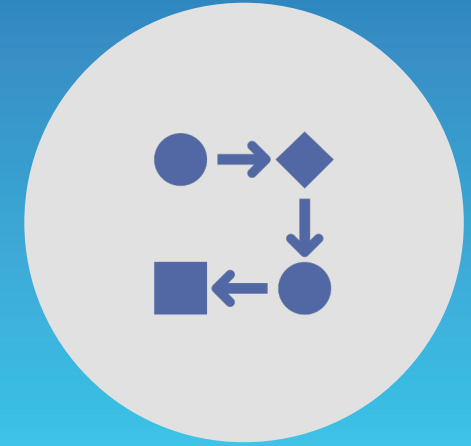
So what are the themes?



WHO ARE MY
KEY PEOPLE?



WHY DO THEY LEAVE?



HOW DO I/WE GET
THEM TO STAY?

Who are my Key People?

**Questions to ask yourself
(and your leadership
team)**

- Who would be the hardest to replace?
- Who has the most impact on our key metrics?
- Who 'lives' our core values and culture?
- Who has the strongest relationships with our customers/vendors, etc.?
- ** If we were selling the business tomorrow, who would I showcase to the buyer?

Fantasy Football – Group Exercise

Dynasty
League

Redraft
League

Why do they leave?

#1....

- **Compensation!!!**

#2....

- **Appreciation**
- **Support**
- **Respect for thoughts and contributions**



How do I get them to stay?

Pay them fairly/appropriately/appropriately plus....AND show them the love.

Principal[®] Business Needs Assessment

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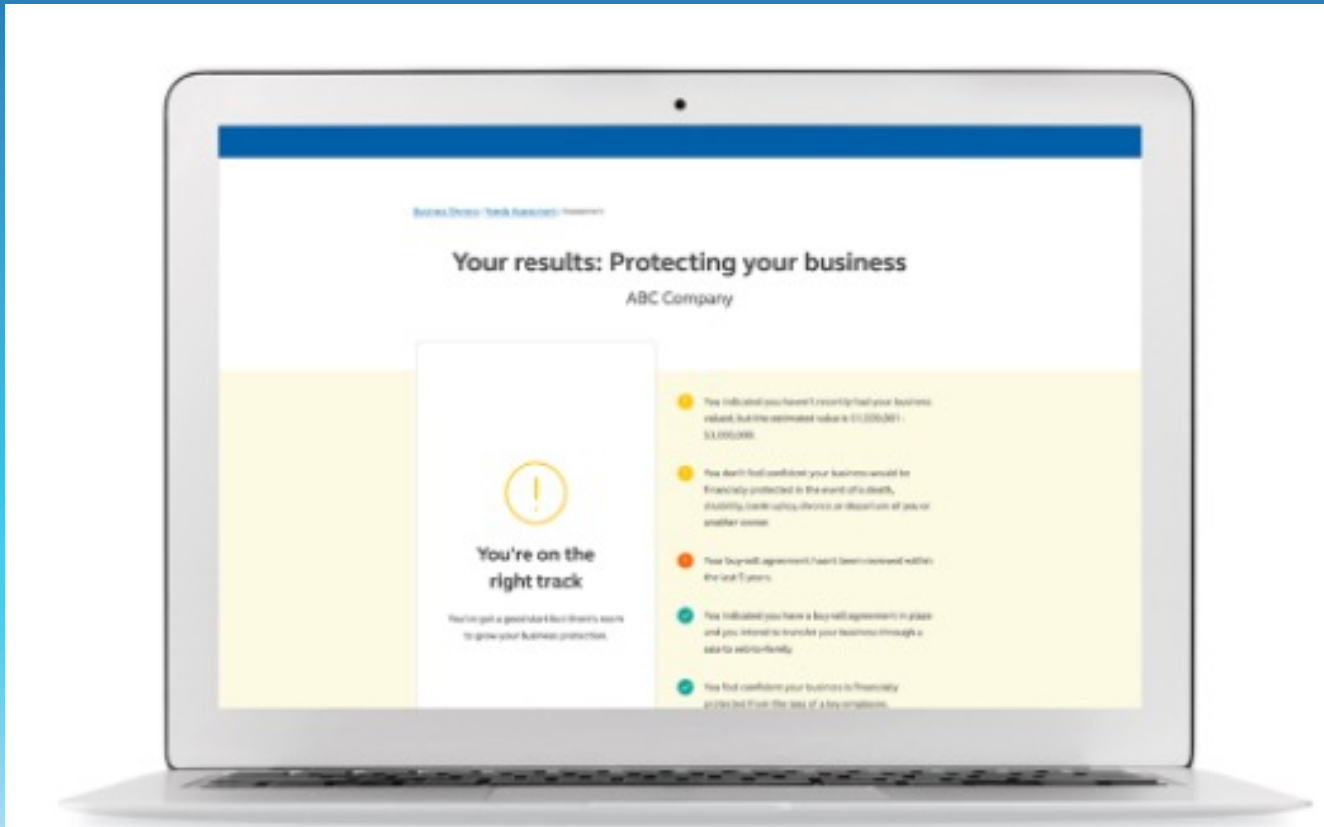


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Principal[®] Business Needs Assessment



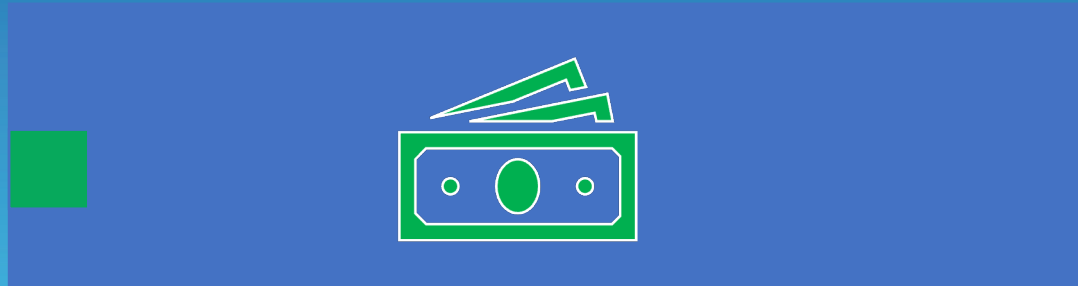
Holistic view of your business planning needs.

You select what's important to you.

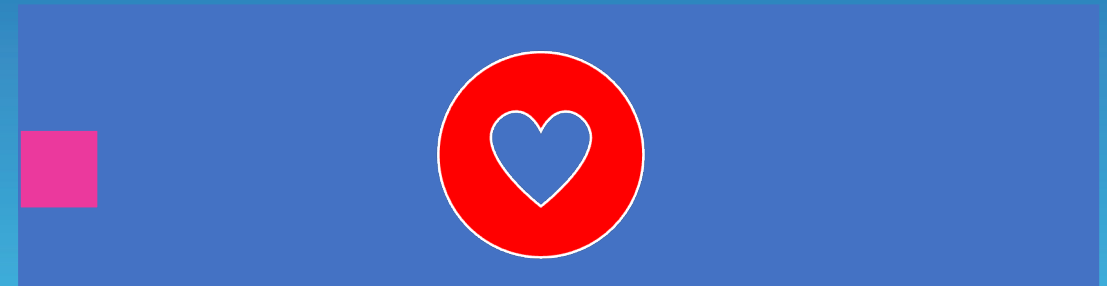
Receive personalized assessments to help:

- Protect your business.
- Protect your employees.
- Protect your lifestyle.

Five Simple Ideas



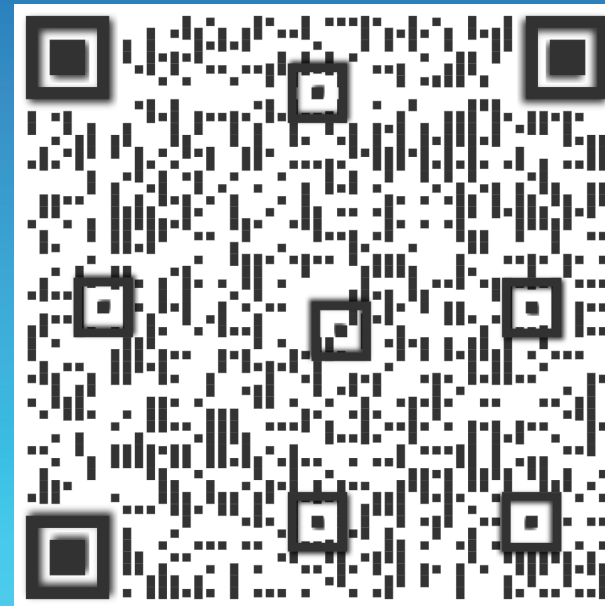
- Bonus Plan
- Long Term Incentive Plan



- Income Protection
- Death Benefit Protection
- Long Term Care

Questions and Discussion

Thank You!!



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