Executive Benefits:
A Conversation Guide for Advisors

WHERE EXECUTIVE BENEFITS SHOW UP

Executive benefit opportunities most often arise during:

- Annual reviews
- Compensation or bonus discussions
- Retention concerns
- Succession or exit planning
- Key person life or disability conversations
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WHAT TO LISTEN FOR

Pay attention to language such as:

- “We can’t afford to lose them”
- “They’re critical to the business”
- “Raises aren’t ideal”
- “We don’t have a formal retention plan”

These are signals — not objections.

SIMPLE DISCOVERY QUESTIONS

- Who in your business is hardest to replace?
- How are you currently rewarding key people?
- What happens if that person leaves or becomes disabled?
- Have you explored alternatives to increasing payroll?

WHEN TO EXPLORE EXECUTIVE BENEFITS

Executive benefits may be appropriate when:

✓ The business relies on key individuals
✓ Retention is a concern
✓ Compensation flexibility is needed
✓ Succession planning is underway
✓ Traditional benefits feel insufficient

HOW REGIS HELPS

Regis partners with advisors to:

- Identify executive benefit opportunities
- Evaluate appropriate strategies
- Support case design and implementation
- Collaborate with carriers and underwriting
- Simplify complex conversations

NEXT STEP

Have a conversation that might fit?
The Regis team is ready to help you evaluate next steps.

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