



Qualified Plan Concepts

Avoiding Penalties on Early Distributions

Household Information

PERSON A

First Name Last Name

Male
 Female

Date of Birth

Married

PERSON B

First Name Last Name

Male
 Female

Date of Birth

ADDRESS

Street

City State Zip

Home Phone Work Phone Email Address

Retirement Plan Information

Enter contributions and distributions as annual amounts.

IRA Owner

Client A Client B

Current Balance	Balance "As of" Date	Interest Rate (max 12%)	Future Interest Rate (optional)
\$	/ /	%	%

If future interest rate is used, when should it be applied? (choose one)

In Calendar Year _____ At Client A's age _____ At Client B's age _____

Employee Contributions	Employer Contributions	Contributions Increase Annually by
\$	\$	%

Contributions should continue until? (choose one)

of Years _____ In Calendar Year _____ At Client A's age _____ At Client B's age _____