Qualified Plan Concepts

Convert to Roth IRA during Lifetime

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 ____

Additional Information

Additional information used to calculate estate planning consequences of this analysis, including estate taxes, if applicable.

Total Other Assets (non-qualified)	**Growth Rate** (max 12%)
$	%

Income Tax Rate	**Future Income Tax Rate** (optional)	**Income Tax Rate for Non-Spouse Beneficiaries**
%	%	%

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

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

Conversion Information

Assume Conversion:

O Next Month O In Calendar Year _____ O At Client A's age _____ O At Client B's age _____