

# A Defined Contribution Retirement Plan

Presented By: [Licensed user's name appears here]

For: Joe and Annie Jordan

## Pre-Retirement Accumulation

		Initial Plan Assets 1,000,000	Plan Yield 7.00%		
		(1) Beginning of Year Balance in Plan Assets	(2) Annual Contribution to the Plan	(3) Beginning of Year Total Plan Assets	(4) Year End Plan Assets
Pre- Retirement Year	Age				
1	60	1,000,000	0	1,000,000	1,064,650
2	61	1,064,650	0	1,064,650	1,133,480
3	62	1,133,480	0	1,133,480	1,206,760
4	63	1,206,760	0	1,206,760	1,284,777
5	64	1,284,777	0	1,284,777	1,367,837
6	65	1,367,837	0	1,367,837	1,456,268
7	66	1,456,268	0	1,456,268	1,550,416
8	67	1,550,416	0	1,550,416	1,650,650
9	68	1,650,650	0	1,650,650	1,757,365
10	69	1,757,365	0	1,757,365	1,870,979

0

Management fees reflected in column (4): 0.50%

Plan results are hypothetical only. Actual results will vary due to changes in contributions and withdrawals, income tax brackets, and investment performance.

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## Retirement Distribution

		Plan Yield 7.00%	Retirement Income Tax Bracket 35.00%			
Retirement Year	Age	(1) Beginning of Year Balance in Plan Assets	(2) Before Tax IRS Required Minimum Distribution*	(3) Before Tax Scheduled Distribution	(4) After Tax Income from Scheduled Distribution	(5) Year End Plan Assets
1	70	1,870,979	68,284	119,365	77,587	1,864,856
2	71	1,864,856	70,372	121,752	79,139	1,855,796
3	72	1,855,796	72,492	124,187	80,722	1,843,558
4	73	1,843,558	74,638	126,671	82,336	1,827,884
5	74	1,827,884	76,802	129,204	83,983	1,808,499
6	75	1,808,499	78,974	131,788	85,662	1,785,110
7	76	1,785,110	81,141	134,424	87,376	1,757,403
8	77	1,757,403	82,896	137,112	89,123	1,725,043
9	78	1,725,043	84,977	139,855	90,906	1,687,670
10	79	1,687,670	86,547	142,652	92,724	1,644,904
11	80	1,644,904	87,963	145,505	94,578	1,596,336
12	81	1,596,336	89,181	148,415	96,470	1,541,529
13	82	1,541,529	90,148	151,383	98,399	1,480,018
14	83	1,480,018	90,799	154,411	100,367	1,411,308
15	84	1,411,308	91,052	157,499	102,374	1,334,868
16	85	1,334,868	90,194	160,649	104,422	1,250,132
17	86	1,250,132	88,662	163,862	106,510	1,156,497
18	87	1,156,497	86,306	167,139	108,641	1,053,320
19	88	1,053,320	82,939	170,482	110,813	939,913
20	89	939,913	78,326	173,892	113,030	815,545
21	90	815,545	71,539	177,370	115,290	679,433
22	91	679,433	62,911	180,917	117,596	530,746
23	92	530,746	52,034	184,535	119,948	368,593
24	93	368,593	38,395	188,226	122,347	192,028
25	94	192,028	21,102	192,028	124,818	0
			1,898,674	3,823,323	2,485,161	

Management fees reflected in column (5): 0.50%

\*Column (2) projects an estimate of the required minimum distribution based on the Uniform Lifetime table life expectancy factors, recalculated each year based on asset value and client age.

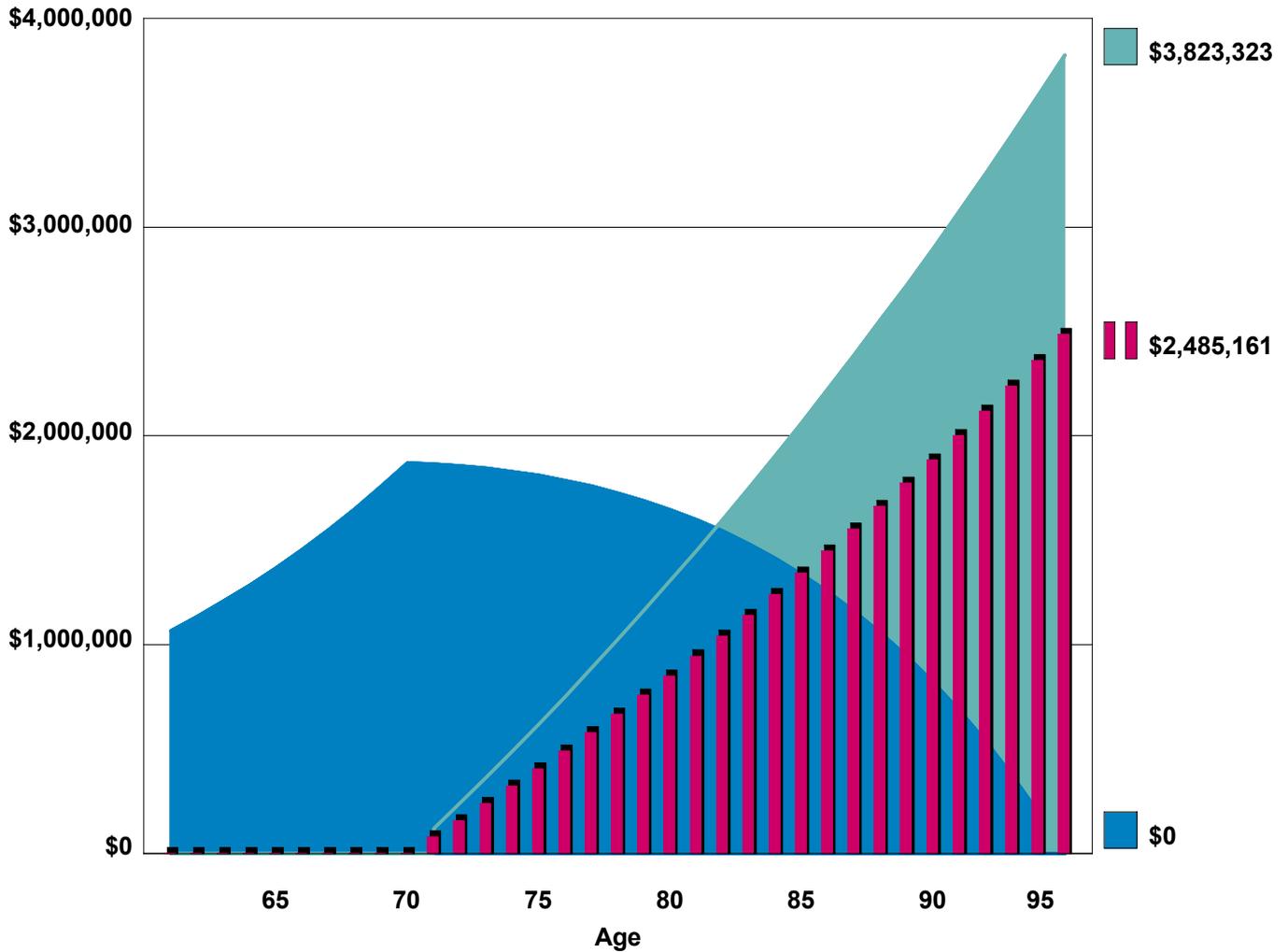
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## Accumulation and Distribution Summary



	At Year 35
After Tax Distributions (Cumulative)	\$2,485,161
Before Tax Distributions (Cumulative)	\$3,823,323
Before Tax Plan Assets <sup>1</sup>	\$0

<sup>1</sup> Includes an assumed initial balance in the account of \$1,000,000.

Note: All projections are based on client furnished data and assumptions.