Convert to Roth IRA at Death

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 _____

Form date 20150521

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)

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

Desired Distributions from the Retirement Plan

Use Life Insurance to Pay Taxes on Conversion

Death Benefit	Premium	Insured	Premium Frequency	Continue Until
$	$	○ Client A ○ Client B	○ Annual ○ Semi-Annual ○ Quarterly ○ Monthly	○ Never Ends ○ Client A's age _____ ○ Client B's age _____ ○ # of Years _____ ○ Calendar Year _____ ○ One Time

Conversion Information

Assume Conversion:

○ Next Month ○ In Calendar Year ______ ○ At Client A's age ______ ○ At Client B's age ______