

# Roth Individual Retirement Account (Roth IRA)

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

For: Erin Coppola

## Accumulation

		Initial Plan Assets 0	Plan Yield 7.00%			
Year	Age	(1) Beginning of Year Balance in Plan Assets	(2) Conversion from Other Retirement Plan Assets	(3) Contribution to the Plan	(4) Beginning of Year Plan Assets	(5) Year End Plan Assets
1	30	0	0	5,500	5,500	5,826
2	31	5,826	0	5,500	11,326	11,998
3	32	11,998	0	5,500	17,498	18,536
4	33	18,536	0	5,500	24,036	25,462
5	34	25,462	0	5,500	30,962	32,798
6	35	32,798	0	5,500	38,298	40,569
7	36	40,569	0	5,500	46,069	48,801
8	37	48,801	0	5,500	54,301	57,521
9	38	57,521	0	5,500	63,021	66,758
10	39	66,758	0	5,500	72,258	76,543
11	40	76,543	0	5,500	82,043	86,908
12	41	86,908	0	5,500	92,408	97,888
13	42	97,888	0	5,500	103,388	109,519
14	43	109,519	0	5,500	115,019	121,839
15	44	121,839	0	5,500	127,339	134,890
16	45	134,890	0	5,500	140,390	148,715
17	46	148,715	0	5,500	154,215	163,360
18	47	163,360	0	5,500	168,860	178,873
19	48	178,873	0	5,500	184,373	195,306
20	49	195,306	0	5,500	200,806	212,713
21	50	212,713	0	6,500	219,213	232,212
22	51	232,212	0	6,500	238,712	252,868
23	52	252,868	0	6,500	259,368	274,749
24	53	274,749	0	6,500	281,249	297,927
25	54	297,927	0	6,500	304,427	322,480
26	55	322,480	0	6,500	328,980	348,489
27	56	348,489	0	6,500	354,989	376,040
28	57	376,040	0	6,500	382,540	405,225
29	58	405,225	0	6,500	411,725	436,141
30	59	436,141	0	6,500	442,641	468,890
			0	175,000		

Management fees reflected in column (5): 1.00%

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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## Accumulation

Initial Plan Assets  
0

Plan Yield  
7.00%

Year	Age	(1) Beginning of Year Balance in Plan Assets	(2) Conversion from Other Retirement Plan Assets	(3) Contribution to the Plan	(4) Beginning of Year Plan Assets	(5) Year End Plan Assets
31	60	468,890	0	6,500	475,390	503,580
32	61	503,580	0	6,500	510,080	540,328
33	62	540,328	0	6,500	546,828	579,255
34	63	579,255	0	6,500	585,755	620,490
35	64	620,490	0	6,500	626,990	664,170
36	65	664,170	0	6,500	670,670	710,441
37	66	710,441	0	6,500	716,941	759,456
38	67	759,456	0	6,500	765,956	811,377
39	68	811,377	0	6,500	817,877	866,377
40	69	866,377	0	6,500	872,877	924,638

0      240,000

Management fees reflected in column (5): 1.00%

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## Distribution

Plan  
Yield  
7.00%

Year	Age	(1) Beginning of Year Balance in Plan Assets	(2) Tax Free Scheduled Distribution	(3) Year End Plan Assets
1	70	924,638	62,939	912,798
2	71	912,798	62,939	900,256
3	72	900,256	62,939	886,970
4	73	886,970	62,939	872,896
5	74	872,896	62,939	857,987
6	75	857,987	62,939	842,194
7	76	842,194	62,939	825,465
8	77	825,465	62,939	807,744
9	78	807,744	62,939	788,972
10	79	788,972	62,939	769,086
11	80	769,086	62,939	748,021
12	81	748,021	62,939	725,708
13	82	725,708	62,939	702,071
14	83	702,071	62,939	677,032
15	84	677,032	62,939	650,509
16	85	650,509	62,939	622,413
17	86	622,413	62,939	592,651
18	87	592,651	62,939	561,124
19	88	561,124	62,939	527,727
20	89	527,727	62,939	492,350
21	90	492,350	62,939	454,875
22	91	454,875	62,939	415,178
23	92	415,178	62,939	373,127
24	93	373,127	62,939	328,582
25	94	328,582	62,939	281,396
26	95	281,396	62,939	231,412
27	96	231,412	62,939	178,463
28	97	178,463	62,939	122,375
29	98	122,375	62,939	62,961
30	99	62,961	62,939	24
			1,888,170	

Management fees reflected in column (3): 1.00%

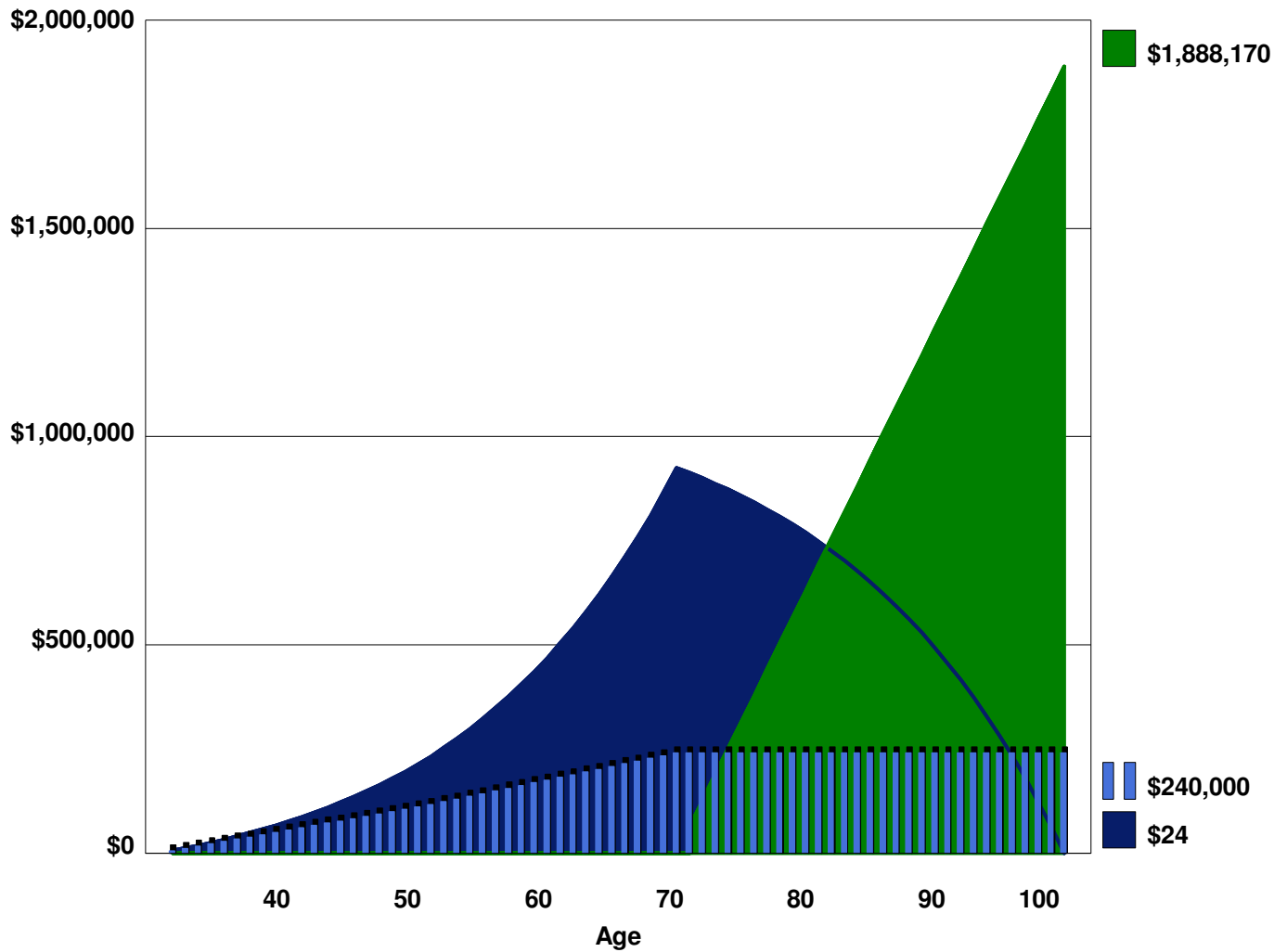
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## Accumulation and Distribution Summary



	At Year 70
Contributions (Cumulative)	\$240,000
Tax Free Distributions (Cumulative)	\$1,888,170
Plan Assets	\$24

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