

Plan Sponsor's Summary of Costs and Benefits

Executive Trifecta Using Indexed Universal Life

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Date: [Current date appears here]

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

Insured: Tom Hamilton
Plan Sponsor: Acme Ford, LLC
Limited Liability Company

	Male Age 40	Form of Transaction (Key Executive Coverage with Deferred Transfer of Policy To Executive)	Policy Transfer to Executive is Illustrated at Beginning of Year 8	Plan Sponsor's Tax Bracket 40.00%	Indexed UL Interest Rate 7.50%				
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
Year	Net Payment	Cumulative Net Payments	Policy Accum Value*	Policy Cash Value*	Portion of Policy Death Benefit Allocated for Key Executive Coverage	Portion of Policy Death Benefit Allocated for Survivor Income Benefit**	Total Policy Death Benefit Required (5) + (6)	Total Policy Death Benefit Provided	Excess Policy Death Benefit (8) - (7)
1	60,000	60,000	51,002	0	1,525,737	1,065,416	2,591,153	2,600,000	8,847
2	60,000	120,000	105,628	46,816	1,525,737	1,065,416	2,591,153	2,600,000	8,847
3	60,000	180,000	164,106	111,820	1,525,737	1,065,416	2,591,153	2,600,000	8,847
4	60,000	240,000	226,688	180,954	1,525,737	1,065,416	2,591,153	2,600,000	8,847
5	60,000	300,000	293,668	254,460	1,525,737	1,065,416	2,591,153	2,600,000	8,847
6	60,000	360,000	366,027	333,345	1,525,737	1,065,416	2,591,153	2,600,000	8,847
7	60,000	420,000	444,275	418,145	1,525,737	1,065,416	2,591,153	2,600,000	8,847
8	9,710	429,710	0	0	0	0	0	0	0
9	0	429,710	0	0	0	0	0	0	0
10	0	429,710	0	0	0	0	0	0	0
11	0	429,710	0	0	0	0	0	0	0
12	0	429,710	0	0	0	0	0	0	0
13	0	429,710	0	0	0	0	0	0	0
14	0	429,710	0	0	0	0	0	0	0
15	0	429,710	0	0	0	0	0	0	0
16	0	429,710	0	0	0	0	0	0	0
17	0	429,710	0	0	0	0	0	0	0
18	0	429,710	0	0	0	0	0	0	0
19	0	429,710	0	0	0	0	0	0	0
20	0	429,710	0	0	0	0	0	0	0
	429,710								

*This is an InsMark supplemental illustration for indexed universal life. In an actual presentation, this footnote refers to an accompanying basic illustration from a specific life insurance company with important details, caveats, and guarantees.

**Key Executive Coverage and Survivor Income Benefit are terminated at the beginning of year 8 when the policy is transferred to the executive.