

Analysis: Add Reverse Mortgage + Roth Conversion + Indexed UL

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

For: Joe Jordon & Annie Jordan

Details of Roth Defined Contribution Assets for Joe Jordon

		Roth Assets Initial Value 0	Roth Assets Yield 7.00%			
Year	M/F Ages	(1) Beginning of Year Roth Assets	(2) Conversions from Retirement Plan Assets	(3) Distribution from Roth Assets	(4) Year End Roth Assets	(5) After Tax Cash Flow from Roth Assets
1	60/60	0	91,310	0	97,213	0
2	61/61	97,213	91,310	0	200,711	0
3	62/62	200,711	91,310	0	310,900	0
4	63/63	310,900	91,310	0	428,213	0
5	64/64	428,213	91,310	0	553,110	0
6	65/65	553,110	91,310	0	686,082	0
7	66/66	686,082	91,310	0	827,650	0
8	67/67	827,650	91,310	0	978,371	0
9	68/68	978,371	91,310	0	1,138,836	0
10	69/69	1,138,836	91,318	0	1,309,683	0
11	70/70	1,309,683	0	0	1,394,354	0
12	71/71	1,394,354	0	0	1,484,499	0
13	72/72	1,484,499	0	0	1,580,472	0
14	73/73	1,580,472	0	0	1,682,650	0
15	74/74	1,682,650	0	0	1,791,433	0
16	75/75	1,791,433	0	0	1,907,249	0
17	76/76	1,907,249	0	0	2,030,553	0
18	77/77	2,030,553	0	0	2,161,828	0
19	78/78	2,161,828	0	0	2,301,590	0
20	79/79	2,301,590	0	0	2,450,388	0
21	80/80	2,450,388	0	0	2,608,806	0
22	81/81	2,608,806	0	0	2,777,465	0
23	82/82	2,777,465	0	0	2,957,028	0
24	83/83	2,957,028	0	21,150	3,125,683	21,150
25	84/84	3,125,683	0	151,949	3,165,986	151,949
26	85/85	3,165,986	0	155,988	3,204,594	155,988
27	86/86	3,204,594	0	160,107	3,241,313	160,107
28	87/87	3,241,313	0	164,310	3,275,931	164,310
29	88/88	3,275,931	0	168,596	3,308,224	168,596
30	89/89	3,308,224	0	172,968	3,337,950	172,968
31	90/90	3,337,950	0	177,427	3,364,851	177,427
32	91/91	3,364,851	0	181,976	3,388,648	181,976
33	92/92	3,388,648	0	186,615	3,409,044	186,615
34	93/93	3,409,044	0	191,348	3,425,720	191,348
35	94/94	3,425,720	0	196,175	3,438,335	196,175
				1,928,609		1,928,609

Column (4) has been reduced by an assumed management fee of 0.50%.

Analysis: Add Reverse Mortgage + Roth Conversion + Indexed UL

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

For: Joe Jordon & Annie Jordan

Details of Roth Defined Contribution Assets for Annie Jordan

		Roth Assets Initial Value 0	Roth Assets Yield 7.00%			
Year	M/F Ages	(1) Beginning of Year Roth Assets	(2) Conversions from Retirement Plan Assets	(3) Distribution from Roth Assets	(4) Year End Roth Assets	(5) After Tax Cash Flow from Roth Assets
1	60/60	0	39,133	0	41,663	0
2	61/61	41,663	39,133	0	86,019	0
3	62/62	86,019	39,133	0	133,243	0
4	63/63	133,243	39,133	0	183,520	0
5	64/64	183,520	39,133	0	237,048	0
6	65/65	237,048	39,133	0	294,036	0
7	66/66	294,036	39,133	0	354,708	0
8	67/67	354,708	39,133	0	419,303	0
9	68/68	419,303	39,133	0	488,074	0
10	69/69	488,074	39,134	0	561,292	0
11	70/70	561,292	0	0	597,580	0
12	71/71	597,580	0	0	636,214	0
13	72/72	636,214	0	0	677,345	0
14	73/73	677,345	0	0	721,135	0
15	74/74	721,135	0	0	767,756	0
16	75/75	767,756	0	0	817,391	0
17	76/76	817,391	0	0	870,235	0
18	77/77	870,235	0	0	926,496	0
19	78/78	926,496	0	0	986,394	0
20	79/79	986,394	0	0	1,050,164	0
21	80/80	1,050,164	0	0	1,118,057	0
22	81/81	1,118,057	0	0	1,190,339	0
23	82/82	1,190,339	0	0	1,267,294	0
24	83/83	1,267,294	0	0	1,349,225	0
25	84/84	1,349,225	0	0	1,436,452	0
26	85/85	1,436,452	0	0	1,529,319	0
27	86/86	1,529,319	0	0	1,628,189	0
28	87/87	1,628,189	0	0	1,733,451	0
29	88/88	1,733,451	0	0	1,845,519	0
30	89/89	1,845,519	0	0	1,964,832	0
31	90/90	1,964,832	0	0	2,091,858	0
32	91/91	2,091,858	0	0	2,227,097	0
33	92/92	2,227,097	0	0	2,371,079	0
34	93/93	2,371,079	0	0	2,524,369	0
35	94/94	2,524,369	0	0	2,687,569	0
				0		0

Column (4) has been reduced by an assumed management fee of 0.50%.