

PlanFacts: Estate Tax Concepts

Collection Date:

Client A Male Married
First Name Last Name Birth Date Female Retirement Age

Client B Male Married
First Name Last Name Birth Date Female Retirement Age

Street Address City State Zip

Home Phone Work Phone Email Address

| Current Estate Values | |
|------------------------------------------------------|----------------------------|
| Current Estate: | \$ <input type="text"/> |
| Existing Life Insurance: (Inside Client's Estate) | \$ <input type="text"/> |
| Years to Project: | <input type="text"/> Years |
| Growth Rate: | <input type="text"/> % |
| Transfer Costs: | <input type="text"/> % |

| Wealth Replacement | |
|----------------------------------------------------------------------------------------------------------------------------------|--|
| <input type="radio"/> Allow software to calculate wealth replacement amount needed to pass 100% of estate to heirs (after taxes) | |
| <input type="radio"/> Illustrate a specified wealth replacement amount | |
| New Wealth Replacement Amount: \$ <input type="text"/> | |

| Prior Gifts | | | |
|----------------------|-------------------------|----------------------|-------------------------|
| Client A | | Client B | |
| Prior Taxable Gifts: | \$ <input type="text"/> | Prior Taxable Gifts: | \$ <input type="text"/> |
| Gift Taxes Paid: | \$ <input type="text"/> | Gift Taxes Paid: | \$ <input type="text"/> |

| Notes | |
|----------------------|--|
| <input type="text"/> | |
| <input type="text"/> | |
| <input type="text"/> | |
| <input type="text"/> | |
| <input type="text"/> | |