Swan + Gardiner, LLC Certified Public Accountants

ROTH IRA CONVERSION ASSUMPTIONS

Your Date of Birth Spouse's Date of Birth Next Generation Beneficiary's Date of Birth Filing Status Year of Projected Conversion Available Outside Assets Total IRA Assets Included in Analysis Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption Needs	CLIENT'S NAME Today's Date	
Next Generation Beneficiary's Date of Birth Filing Status Year of Projected Conversion Available Outside Assets Total IRA Assets Included in Analysis Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Your Date of Birth	
Year of Projected Conversion Available Outside Assets Total IRA Assets Included in Analysis Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Spouse's Date of Birth	
Year of Projected Conversion Available Outside Assets Total IRA Assets Included in Analysis Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Next Generation Beneficiary's Date of Birth	
Available Outside Assets Total IRA Assets Included in Analysis Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Filing Status	
Total IRA Assets Included in Analysis Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Year of Projected Conversion	
Special 2010 Conversion Tax Option Applied? Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Available Outside Assets	
Taxable Income for Year of Conversion Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Total IRA Assets Included in Analysis	
Projected Year of Retirement Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Special 2010 Conversion Tax Option Applied?	
Projected Tax Rate in Retirement Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Taxable Income for Year of Conversion	
Monthly Income Goal from IRA Assets During Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Projected Year of Retirement	
Retirement Projected Duration of Retirement Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption		
Projected Duration of Next Generation Payout Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption		
Monthly Income Goal from IRA Assets for Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Projected Duration of Retirement	
Next Generation Projected Tax Rate for Next Generation Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption		
Annual Rate of Return Assumption State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption		
State Tax Rate for Year of Conversion 5% Inflation Adjustment for Monthly Consumption	Projected Tax Rate for Next Generation	
Inflation Adjustment for Monthly Consumption	Annual Rate of Return Assumption	
	Inflation Adjustment for Monthly Consumption Needs	

E-mail Address to send report:_