

**ROTH IRA CONVERSION ASSUMPTIONS**

**CLIENT'S NAME** \_\_\_\_\_

**Today's Date** \_\_\_\_\_

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

**FAX COMPLETED FORM TO: 702-313-9900**

**E-mail Address to send report:** \_\_\_\_\_