

Sample Client - Supplemental Executive Retirement Plan

Benefit Statement for the Period January 1, 2015 to December 31, 2015

Jill Doe

Contact Information

Jill Doe
123 Retirement Lane
XYZ, LA 70760

Participant Profile

Date of Birth 01/01/1971
Date of Hire 01/01/2005
Plan Entry Date 01/01/2007
Status Active

Account Overview

	History 01/01/2007 12/31/2014	Current 01/01/2015 12/31/2015	Total 01/01/2007 12/31/2015
Beginning Balance	0.00	53,758.84	0.00
Amount Credited	53,758.84	1,367.44	55,126.28
Distributions	0.00	0.00	0.00
Ending Balance	53,758.84	55,126.28	55,126.28
Vested Balance	53,758.84	55,126.28	55,126.28

Beneficiary Information

Type	Name	Relationship	Percent
Primary	Tommy Doe	Spouse	100.00%
Contingent	Suzie Jones	Daughter	100.00%

Account Activity

Account	Beginning Balance	Amount Credited	Distributions	Ending Balance	Vesting	Vested Balance
Contribution Credits	53,758.84	1,367.44	0.00	55,126.28	100.00%	55,126.28
TOTAL	53,758.84	1,367.44	0.00	55,126.28		55,126.28

Distribution Election Summary

Distribution Type	Account	First Scheduled Payment	Next Scheduled Payment	Distribution Method	Installments	Frequency	Remaining * Installments
Separation from Service (on/after age 65)	Contribution Credits			Installments	10	Annually	10
Separation from Service (prior to age 65)	Contribution Credits			Lump Sum	1	Annually	1
Disability	Contribution Credits			Installments	3	Annually	3
Death	Contribution Credits			Lump Sum	1	Annually	1

* Includes installment on Next Scheduled Payment date shown.

IMPORTANT: The values on this report represent a measure of your benefit under the Plan Sponsor's nonqualified plan. The values are determined by the investments described in the plan agreement and are considered estimates, not guarantees. The Plan Sponsor may or may not actually hold or set aside these investments. At any point in time, actual values can and will vary. All questions concerning your plan(s) should be directed to your Plan Administrator (see plan document(s) for exact details).

The Pangburn Group cannot and does not engage in the practice of law or accounting. Consequently, the information provided here is not intended to present an opinion on legal, tax, accounting or investment matters. Please consult professional advisors for legal, tax, accounting or investment advice, as applicable, before taking any action based on this information.

Sample Client - Supplemental Executive Retirement Plan

Benefit Statement for the Period January 1, 2015 to December 31, 2015

Bob Jones

Contact Information

Bob Jones
 Test Drive
 Baton Rouge, LA 70820

Participant Profile

Date of Birth 01/01/1966
 Date of Hire 01/01/2000
 Plan Entry Date 01/01/2007
 Status Active

Account Overview

	History 01/01/2007 12/31/2014	Current 01/01/2015 12/31/2015	Total 01/01/2007 12/31/2015
Beginning Balance	0.00	120,130.49	0.00
Amount Credited	120,130.49	3,283.15	123,413.64
Distributions	0.00	0.00	0.00
Ending Balance	120,130.49	123,413.64	123,413.64
Vested Balance	120,130.49	123,413.64	123,413.64

Beneficiary Information

Type	Name	Relationship	Percent
Primary	Mary Jones	Spouse	100.00%
Contingent	Jack Jones	Son	50.00%
	William Jones	Brother	50.00%

Account Activity

Account	Beginning Balance	Amount Credited	Distributions	Ending Balance	Vesting	Vested Balance
Contribution Credits	120,130.49	3,283.15	0.00	123,413.64	100.00%	123,413.64
TOTAL	120,130.49	3,283.15	0.00	123,413.64		123,413.64

Distribution Election Summary

Distribution Type	Account	First Scheduled Payment	Next Scheduled Payment	Distribution Method	Installments	Frequency	Remaining Installments *
Separation from Service (on/after age 65)	Contribution Credits			Installments	5	Annually	5
Separation from Service (prior to age 65)	Contribution Credits			Lump Sum	1	Annually	1
Disability	Contribution Credits			Installments	3	Annually	3
Death	Contribution Credits			Lump Sum	1	Annually	1

* Includes installment on Next Scheduled Payment date shown.

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