

# Sample Client

## Nonqualified Defined Benefit (DB - ASC 710) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2024

**A Participant**

#### Projected Benefits

##### Retirement Benefit:

Annual Benefit:	78,711.93
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Normal Retirement Date.*

##### Voluntary Termination Benefit:

Annual Benefit:	47,407.41
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following age Separation from Service.*

##### Involuntary Termination Benefit:

Annual Benefit:	64,000.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Separation from Service.*

##### Change in Control Benefit:

Annual Benefit:	64,000.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Separation from Service.*

##### Disability Benefit:

Annual Benefit:	47,407.41
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following age 65.*

**IMPORTANT:** This is an estimate of benefits based on current assumptions and is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit plan. All questions concerning your benefits should be directed to your plan sponsor. (See plan document(s) for details.)

The Pangburn Group is not a law firm or accounting firm and does not function as a broker-dealer or investment advisor. Consequently, no portion of the information provided herein should be interpreted as legal, actuarial, accounting, tax or investment advice. Recipients of this information should consult professional advisors for legal, actuarial, tax, or investment advice, as applicable, before taking any action based on this information.

Generated on 02/22/2024 at 07:23:38 AM CT

**Sample Client**  
**Nonqualified Defined Benefit (DB - ASC 710) Plan**  
**STATEMENT OF ESTIMATED BENEFITS**

As of 12/31/2024

**A Participant**

**Death Benefit:**

Annual Benefit:	64,000.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments to beneficiaries commence on the first day of the month following Death.*

**Benefit Information**

Benefit Percent:	50.00%
------------------	--------

**Participant Data**

Date of Birth:	01/01/1967
Date of Hire:	01/01/2005
Date of Entry:	01/01/2012
Date of Retirement:	01/01/2032
Vested Percent:	74.07%

**Compensation Data**

Current Salary:	128,000.00
Final Average Salary:	157,423.85

**Beneficiary Information**

<u>Type</u>	<u>Name</u>	<u>Relationship</u>	<u>Percent</u>
Primary	Mrs. A. Participant	Spouse	100.00%
Contingent	Little 1 A. Participant	Child	50.00%
Contingent	Little 2 A. Participant	Child	50.00%

**IMPORTANT:** This is an estimate of benefits based on current assumptions and is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit plan. All questions concerning your benefits should be directed to your plan sponsor. (See plan document(s) for details.)

The Pangburn Group is not a law firm or accounting firm and does not function as a broker-dealer or investment advisor. Consequently, no portion of the information provided herein should be interpreted as legal, actuarial, accounting, tax or investment advice. Recipients of this information should consult professional advisors for legal, actuarial, tax, or investment advice, as applicable, before taking any action based on this information.

Generated on 02/22/2024 at 07:23:38 AM CT

# Sample Client

## Nonqualified Defined Benefit (DB - ASC 710) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2024

**B Participant**

#### Projected Benefits

##### Retirement Benefit:

Annual Benefit:	77,710.93
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Normal Retirement Date.*

##### Voluntary Termination Benefit:

Annual Benefit:	67,824.07
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following age Separation from Service.*

##### Involuntary Termination Benefit:

Annual Benefit:	73,250.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Separation from Service.*

##### Change in Control Benefit:

Annual Benefit:	73,250.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Separation from Service.*

##### Disability Benefit:

Annual Benefit:	67,824.07
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following age 65.*

**IMPORTANT:** This is an estimate of benefits based on current assumptions and is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit plan. All questions concerning your benefits should be directed to your plan sponsor. (See plan document(s) for details.)

The Pangburn Group is not a law firm or accounting firm and does not function as a broker-dealer or investment advisor. Consequently, no portion of the information provided herein should be interpreted as legal, actuarial, accounting, tax or investment advice. Recipients of this information should consult professional advisors for legal, actuarial, tax, or investment advice, as applicable, before taking any action based on this information.

Generated on 02/22/2024 at 07:23:38 AM CT

# Sample Client

## Nonqualified Defined Benefit (DB - ASC 710) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2024

#### B Participant

#### Death Benefit:

Annual Benefit: 73,250.00  
Payout Duration / Number of Payments: 180  
Payout Frequency: Monthly

*Benefit payments to beneficiaries commence on the first day of the month following Death.*

#### Benefit Information

Benefit Percent: 50.00%

#### Participant Data

Date of Birth: 01/01/1962  
Date of Hire: 01/01/2000  
Date of Entry: 01/01/2012  
Date of Retirement: 01/01/2027  
Vested Percent: 92.59%

#### Compensation Data

Current Salary: 146,500.00  
Final Average Salary: 155,421.85

#### Beneficiary Information

<u>Type</u>	<u>Name</u>	<u>Relationship</u>	<u>Percent</u>
Primary	Mrs. B. Participant	Spouse	100.00%
Contingent	Little B. Participant	Child	100.00%

**IMPORTANT:** This is an estimate of benefits based on current assumptions and is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit plan. All questions concerning your benefits should be directed to your plan sponsor. (See plan document(s) for details.)

The Pangburn Group is not a law firm or accounting firm and does not function as a broker-dealer or investment advisor. Consequently, no portion of the information provided herein should be interpreted as legal, actuarial, accounting, tax or investment advice. Recipients of this information should consult professional advisors for legal, actuarial, tax, or investment advice, as applicable, before taking any action based on this information.

Generated on 02/22/2024 at 07:23:38 AM CT

# Sample Client

## Nonqualified Defined Benefit (DB - ASC 710) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2024

**C Participant**

#### Projected Benefits

##### Retirement Benefit:

Annual Benefit:	96,691.59
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Normal Retirement Date.*

##### Voluntary Termination Benefit:

Annual Benefit:	26,419.35
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following age Separation from Service.*

##### Involuntary Termination Benefit:

Annual Benefit:	58,500.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Separation from Service.*

##### Change in Control Benefit:

Annual Benefit:	58,500.00
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following Separation from Service.*

##### Disability Benefit:

Annual Benefit:	26,419.35
Payout Duration / Number of Payments:	180
Payout Frequency:	Monthly

*Benefit payments commence on the first day of the month following age 65.*

**IMPORTANT:** This is an estimate of benefits based on current assumptions and is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit plan. All questions concerning your benefits should be directed to your plan sponsor. (See plan document(s) for details.)

The Pangburn Group is not a law firm or accounting firm and does not function as a broker-dealer or investment advisor. Consequently, no portion of the information provided herein should be interpreted as legal, actuarial, accounting, tax or investment advice. Recipients of this information should consult professional advisors for legal, actuarial, tax, or investment advice, as applicable, before taking any action based on this information.

Generated on 02/22/2024 at 07:23:38 AM CT

# Sample Client

## Nonqualified Defined Benefit (DB - ASC 710) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2024

#### C Participant

#### Death Benefit:

Annual Benefit: 58,500.00  
Payout Duration / Number of Payments: 180  
Payout Frequency: Monthly

*Benefit payments to beneficiaries commence on the first day of the month following Death.*

#### Benefit Information

Benefit Percent: 50.00%

#### Participant Data

Date of Birth: 01/01/1977  
Date of Hire: 01/01/2011  
Date of Entry: 01/01/2012  
Date of Retirement: 01/01/2042  
Vested Percent: 45.16%

#### Compensation Data

Current Salary: 117,000.00  
Final Average Salary: 193,383.17

#### Beneficiary Information

<u>Type</u>	<u>Name</u>	<u>Relationship</u>	<u>Percent</u>
Primary	Mr. C. Participant	Spouse	100.00%
Contingent	Little 1 C. Participant	Child	25.00%
Contingent	Little 2 C. Participant	Child	25.00%
Contingent	Little 3 C. Participant	Child	25.00%
Contingent	Little 4 C. Participant	Child	25.00%

**IMPORTANT:** This is an estimate of benefits based on current assumptions and is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit plan. All questions concerning your benefits should be directed to your plan sponsor. (See plan document(s) for details.)

The Pangburn Group is not a law firm or accounting firm and does not function as a broker-dealer or investment advisor. Consequently, no portion of the information provided herein should be interpreted as legal, actuarial, accounting, tax or investment advice. Recipients of this information should consult professional advisors for legal, actuarial, tax, or investment advice, as applicable, before taking any action based on this information.

Generated on 02/22/2024 at 07:23:38 AM CT