

Sample Client

Nonqualified Defined Benefit (DB) Plan

STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2018

A Participant

Projected Benefits

Retirement Benefit:

Annual Benefit	87,010.62
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	30,722.22
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	59,250.00
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	59,250.00
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	30,722.22
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

Death Benefit:

Annual Benefit	59,250.00
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

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.)

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Sample Client

Nonqualified Defined Benefit (DB) Plan

STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2018

A Participant

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: 51.85%

Compensation Data:

Current Salary: 118,500.00
Final Average Salary: 174,021.25

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%

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Nonqualified Defined Benefit (DB) Plan

STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2018

B Participant

Projected Benefits

Retirement Benefit:

Annual Benefit	87,723.83
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	48,731.48
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	69,250.00
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	69,250.00
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	48,731.48
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

Death Benefit:

Annual Benefit	69,250.00
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

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Nonqualified Defined Benefit (DB) Plan

STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2018

B Participant

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: 70.37%

Compensation Data:

Current Salary: 138,500.00
Final Average Salary: 175,447.66

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%

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Nonqualified Defined Benefit (DB) Plan

STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2018

C Participant

Projected Benefits

Retirement Benefit:

Annual Benefit	103,613.29
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	13,548.39
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	52,500.00
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	52,500.00
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	13,548.39
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

Death Benefit:

Annual Benefit	52,500.00
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

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Nonqualified Defined Benefit (DB) Plan

STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2018

C Participant

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: 25.81%

Compensation Data:

Current Salary: 105,000.00
Final Average Salary: 207,226.58

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%

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