

# Sample Client

## Nonqualified Defined Benefit (DB) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2017

A Participant

#### Projected Benefits

##### Retirement Benefit:

Annual Benefit	88,486.50
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	28,166.67
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	28,166.67
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	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.

IMPORTANT: This is an estimate of benefits based on current assumptions and is for information purposes only. It is not a guarantee. Your actual benefits will be paid in accordance with the terms of your benefit contract with the Plan Sponsor.

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# Sample Client

## Nonqualified Defined Benefit (DB) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2017

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: 48.15%

#### Compensation Data:

Current Salary: 117,000.00  
Final Average Salary: 176,973.00

#### 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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# Sample Client

## Nonqualified Defined Benefit (DB) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2017

B Participant

#### Projected Benefits

##### Retirement Benefit:

Annual Benefit	89,376.96
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	45,666.67
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	68,500.00
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	68,500.00
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	45,666.67
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	68,500.00
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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**Sample Client**  
**Nonqualified Defined Benefit (DB) Plan**  
**STATEMENT OF ESTIMATED BENEFITS**  
As of 12/31/2017  
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: 66.67%

**Compensation Data:**

Current Salary: 137,000.00  
Final Average Salary: 178,753.93

**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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# Sample Client

## Nonqualified Defined Benefit (DB) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2017

C Participant

#### Projected Benefits

##### Retirement Benefit:

Annual Benefit	101,639.71
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	11,290.32
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	50,000.00
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	50,000.00
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	11,290.32
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	50,000.00
Payout Duration/ Number of Payments	180
Payout Frequency	Monthly

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

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# Sample Client

## Nonqualified Defined Benefit (DB) Plan

### STATEMENT OF ESTIMATED BENEFITS

As of 12/31/2017

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: 22.58%

#### Compensation Data:

Current Salary: 100,000.00  
Final Average Salary: 203,279.41

#### 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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