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**Sample Client**  
**Executive Bonus Plan**  
**SUMMARY OF PLAN BENEFITS**  
for  
**1 Executive**

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**ASSUMPTIONS**

Insurance Carrier  
Policy Number

ABC Life  
18114654

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**ESTIMATED PLAN BENEFITS AS OF 12/31/2024 (1)**

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<b>Total Death Benefit (2)</b>		<b>258,677.00</b>
<b>Total Cash Surrender Value (2)</b>		<b>31,476.39</b>
<b>Cumulative Premiums Paid</b>		<b>29,597.00</b>
<b>Policy Loan Outstanding</b>		<b>0.00</b>
<b>Bonus From Employer:</b>	<b>a) To Pay Premium</b>	<b>1,741.00</b>
	<b>b) To Pay Taxes</b>	<b>574.53</b>
	<b>c) Total Bonus</b>	<b>2,315.53</b>

(1) Estimated plan benefits are based on policy information available as of 12/31/2024.

(2) Loans and Loan Repayments may not be reflected in values above. In the event of a death or surrender, values MUST be adjusted by any outstanding policy indebtedness.

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, accounting, tax, or investment advice, as applicable, before taking any action based on this information.

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**Sample Client**  
**Executive Bonus Plan**  
**SUMMARY OF PLAN BENEFITS**  
for  
**2 Executive**

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**ASSUMPTIONS**

Insurance Carrier  
Policy Number

ABC Life  
18114658

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**ESTIMATED PLAN BENEFITS AS OF 12/31/2024 (1)**

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<b>Total Death Benefit (2)</b>		<b>300,000.00</b>
<b>Total Cash Surrender Value (2)</b>		<b>63,948.52</b>
<b>Cumulative Premiums Paid</b>		<b>57,167.77</b>
<b>Policy Loan Outstanding</b>		<b>0.00</b>
<b>Bonus From Employer:</b>	<b>a) To Pay Premium</b>	<b>3,362.81</b>
	<b>b) To Pay Taxes</b>	<b>1,109.73</b>
	<b>c) Total Bonus</b>	<b>4,472.54</b>

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**Sample Client**  
**Executive Bonus Plan**  
**SUMMARY OF PLAN BENEFITS**  
for  
**3 Executive**

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**ASSUMPTIONS**

Insurance Carrier  
Policy Number

ABC Life  
18114651

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**ESTIMATED PLAN BENEFITS AS OF 12/31/2024 (1)**

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<b>Total Death Benefit (2)</b>		<b>206,588.00</b>
<b>Total Cash Surrender Value (2)</b>		<b>49,180.16</b>
<b>Cumulative Premiums Paid</b>		<b>53,226.24</b>
<b>Policy Loan Outstanding</b>		<b>0.00</b>
<b>Bonus From Employer:</b>	<b>a) To Pay Premium</b>	<b>3,139.39</b>
	<b>b) To Pay Taxes</b>	<b>1,036.00</b>
	<b>c) Total Bonus</b>	<b>4,175.39</b>

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