
Sample Client

162 Bonus Plan

SUMMARY OF PLAN BENEFITS

for

First Person

ASSUMPTIONS

Insurance Carrier
Policy Number

XYZ Life
TPC01

ESTIMATED PLAN BENEFITS AS OF 12/31/2017 (1)

	<u>For The Year</u>	<u>Cumulative</u>
Premium Paid (TOTAL)	15,000.00	135,500.00
Premium Paid By Employer	0.00	40,000.00
Premium Paid By Employee	15,000.00	95,500.00
Cash Surrender Value Owned By Employee (2)	n/a	86,764.00

Total Death Benefit (2): \$1,000,000.00

(1) Estimated plan benefits are based on policy information available as of 12/31/2017.

(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.

Sample Client

162 Bonus Plan

SUMMARY OF PLAN BENEFITS

for

Second Person

ASSUMPTIONS

Insurance Carrier
Policy Number

XYZ Life
TPC02

ESTIMATED PLAN BENEFITS AS OF 12/31/2017 (1)

	<u>For The Year</u>	<u>Cumulative</u>
Premium Paid (TOTAL)	10,000.00	76,000.00
Premium Paid By Employer	10,000.00	76,000.00
Premium Paid By Employee	0.00	0.00
Cash Surrender Value Owned By Employee (2)	n/a	66,812.00

Total Death Benefit (2): \$850,000.00

(1) Estimated plan benefits are based on policy information available as of 12/31/2017.

(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.

Sample Client

162 Bonus Plan

SUMMARY OF PLAN BENEFITS

for

Third Person

ASSUMPTIONS

Insurance Carrier
Policy Number

XYZ Life
TPC03

ESTIMATED PLAN BENEFITS AS OF 12/31/2017 (1)

	<u>For The Year</u>	<u>Cumulative</u>
Premium Paid (TOTAL)	20,000.00	168,000.00
Premium Paid By Employer	20,000.00	168,000.00
Premium Paid By Employee	0.00	0.00
Cash Surrender Value Owned By Employee (2)	n/a	147,843.00

Total Death Benefit (2): \$1,850,000.00

(1) Estimated plan benefits are based on policy information available as of 12/31/2017.

(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.