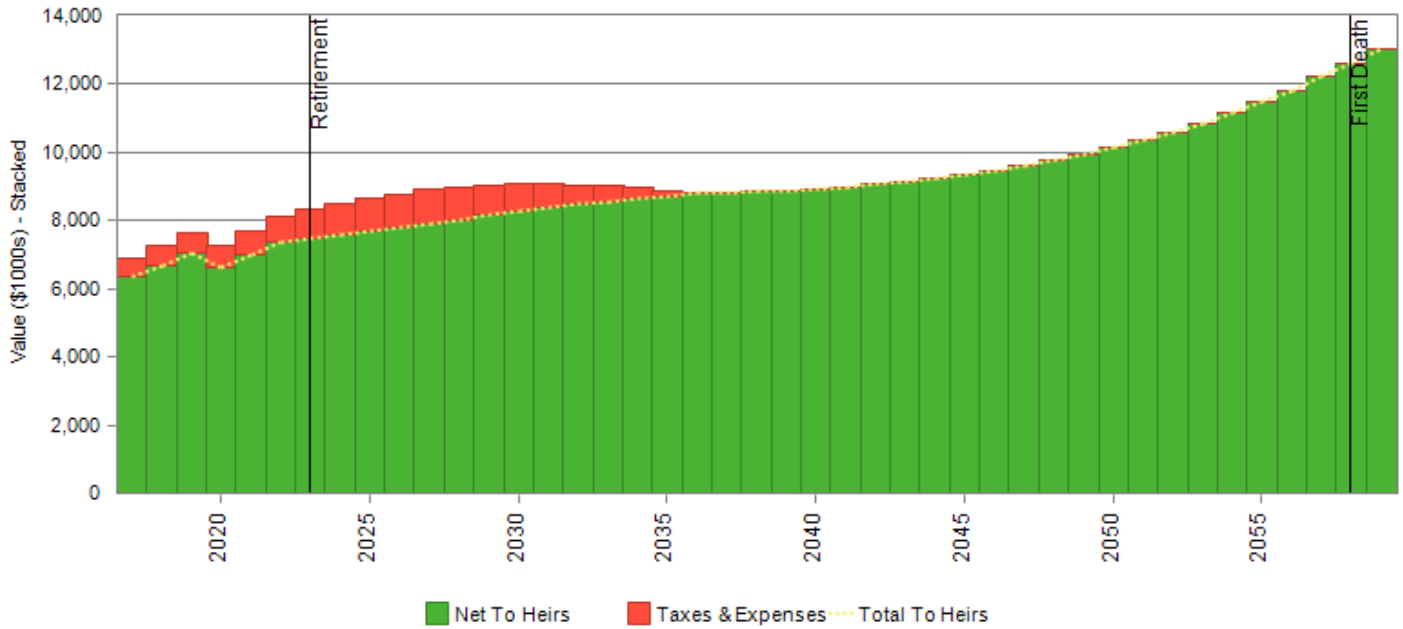


# Estate Transfer

Prepared for Paul and Lynn Price

The Estate Transfer report shows the projected value of assets inside and outside of your estate, the reduction in value due to transfer taxes, and the net amount to your heirs.

Estate Transfer Value and Costs



| Year        | Age          | Gross Estate     | Taxes & Expenses | Net To Heirs     | Total To Heirs   |
|-------------|--------------|------------------|------------------|------------------|------------------|
| 2017        | 59/58        | \$6,882,904      | \$514,896        | \$6,368,008      | \$6,368,008      |
| 2018        | 60/59        | 7,241,706        | 561,180          | 6,680,526        | 6,680,526        |
| 2019        | 61/60        | 7,642,637        | 611,169          | 7,031,469        | 7,031,469        |
| 2020        | 62/61        | 7,285,034        | 664,697          | 6,620,338        | 6,620,338        |
| 2021        | 63/62        | 7,702,462        | 722,374          | 6,980,088        | 6,980,088        |
| 2022        | 64/63        | 8,145,620        | 784,184          | 7,361,436        | 7,361,436        |
| <b>2023</b> | <b>65/64</b> | <b>8,327,427</b> | <b>826,266</b>   | <b>7,501,161</b> | <b>7,501,161</b> |
| 2024        | 66/65        | 8,480,035        | 871,490          | 7,608,545        | 7,608,545        |
| 2025        | 67/66        | 8,633,971        | 920,066          | 7,713,906        | 7,713,906        |
| 2026        | 68/67        | 8,788,825        | 972,221          | 7,816,604        | 7,816,604        |
| 2027        | 69/68        | 8,943,816        | 1,028,196        | 7,915,620        | 7,915,620        |
| 2028        | 70/69        | 8,998,956        | 961,402          | 8,037,554        | 8,037,554        |
| 2029        | 71/70        | 9,035,949        | 881,334          | 8,154,615        | 8,154,615        |
| 2030        | 72/71        | 9,058,273        | 791,203          | 8,267,069        | 8,267,069        |
| 2031        | 73/72        | 9,064,193        | 690,129          | 8,374,065        | 8,374,065        |
| 2032        | 74/73        | 9,051,899        | 577,192          | 8,474,707        | 8,474,707        |
| 2033        | 75/74        | 9,019,371        | 451,384          | 8,567,987        | 8,567,987        |
| 2034        | 76/75        | 8,964,461        | 311,631          | 8,652,830        | 8,652,830        |
| 2035        | 77/76        | 8,884,835        | 156,779          | 8,728,056        | 8,728,056        |
| 2036        | 78/77        | 8,796,767        | 0                | 8,796,767        | 8,796,767        |
| 2037        | 79/78        | 8,819,957        | 0                | 8,819,957        | 8,819,957        |
| 2038        | 80/79        | 8,851,055        | 0                | 8,851,055        | 8,851,055        |
| 2039        | 81/80        | 8,890,771        | 0                | 8,890,771        | 8,890,771        |
| 2040        | 82/81        | 8,939,818        | 0                | 8,939,818        | 8,939,818        |
| 2041        | 83/82        | 8,999,016        | 0                | 8,999,016        | 8,999,016        |
| 2042        | 84/83        | 9,069,174        | 0                | 9,069,174        | 9,069,174        |
| 2043        | 85/84        | 9,151,215        | 0                | 9,151,215        | 9,151,215        |
| 2044        | 86/85        | 9,246,889        | 0                | 9,246,889        | 9,246,889        |
| 2045        | 87/86        | 9,356,166        | 0                | 9,356,166        | 9,356,166        |
| 2046        | 88/87        | 9,480,126        | 0                | 9,480,126        | 9,480,126        |
| 2047        | 89/88        | 9,619,956        | 0                | 9,619,956        | 9,619,956        |

| Year        | Age           | Gross Estate      | Taxes & Expenses | Net To Heirs      | Total To Heirs    |
|-------------|---------------|-------------------|------------------|-------------------|-------------------|
| 2048        | 90/89         | 9,776,926         | 0                | 9,776,926         | 9,776,926         |
| 2049        | 91/90         | 9,952,342         | 0                | 9,952,342         | 9,952,342         |
| 2050        | 92/91         | 10,147,648        | 0                | 10,147,648        | 10,147,648        |
| 2051        | 93/92         | 10,364,372        | 0                | 10,364,372        | 10,364,372        |
| 2052        | 94/93         | 10,604,147        | 0                | 10,604,147        | 10,604,147        |
| 2053        | 95/94         | 10,868,713        | 0                | 10,868,713        | 10,868,713        |
| 2054        | 96/95         | 11,159,943        | 0                | 11,159,943        | 11,159,943        |
| 2055        | 97/96         | 11,479,805        | 0                | 11,479,805        | 11,479,805        |
| 2056        | 98/97         | 11,830,431        | 0                | 11,830,431        | 11,830,431        |
| 2057        | 99/98         | 12,214,081        | 0                | 12,214,081        | 12,214,081        |
| <b>2058</b> | <b>100/99</b> | <b>12,633,181</b> | <b>0</b>         | <b>12,633,181</b> | <b>12,633,181</b> |
| 2059        | 101/100       | 13,016,259        | 0                | 13,016,259        | 13,016,259        |

This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/ representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.