WILKINS MILLER HIERONYMUS
WEALTH MANAGEMENT LLC

ROTH CONVERSION DATA FORM

Client Name:_____ Client Age:_____

I. Amount of conversion: $_____

II. If Traditional IRA, have any nondeductible contributions been made to <u>any</u> of the clients IRA accounts? Yes / No

If yes, then:
- Value of all client IRA's: $_____
- Value of all nondeductible contributions: $_____
- Value of all nondeductible distributions: $_____

~~III.~~ Scenarios to Model

___ Accumulation Only
___ Accumulation and Distribution to Owner
Age to Start Distributions: _____
___ Accumulation and Distribution to Heir
Current Age of Intended Heir: _____

IV. Split taxes due over 2011 and 2012? Yes / No

V. Marginal Tax Rate Accumulation Period _____%
Distribution Period _____%

VI. Amount of taxes paid from an outside source? $_____

VII. Investment Returns (Default to 7% if blank)
Accumulation Period _____%
Distribution Period _____%

VIII. Life Expectancy of Client in years? _____
(Default to age 90 if blank)

Notes:
_____
_____
_____

_____ Return to me for review: Name:_____

_____ Follow-up directly with client: Client Phone Number _____