



Roth Conversion

This will only provide a fast and easy way to demonstrate the potential benefits of a Roth Conversion in a limited scope. A much more meaningful and useful analysis of a Roth Conversion requires more information about your unique goals and resources. This can be accomplished only by creating a Retirement Lifestyle Plan where the benefit of the Roth Conversion can be judged based upon how it affects your overall Plan results. Fill out this form and mail it back to: Visionary Horizons, Roth Conversion Team, 10215 Technology Drive, Suite 303, Knoxville, TN 37932.

Your Name: _____

Address: _____

City, State, Zip _____

Phone: _____

Current Age: _____

What type of assets are you converting? (Circle one)

Traditional IRA

Eligible Retirement Plan (401K, 403b, etc.)

Amount to Convert :	\$	<input style="width: 90%;" type="text"/>
Marginal Tax Rate during the accumulation (estimated)	%	<input style="width: 90%;" type="text"/>
Marginal Tax Rate during the distributions (estimated)	%	<input style="width: 90%;" type="text"/>

Have you ever made nondeductible contributions to any traditional IRA? (Circle one)

YES

NO

(If yes, you may be subject to the Pro Rata Rule for traditional IRAs.)

What is the current total value of all the traditional IRA's you own?	\$	<input style="width: 90%;" type="text"/>
What is the total value of all nondeductible contributions you have made to all your IRAs?	\$	<input style="width: 90%;" type="text"/>
What is the total value of the nondeductible contributions you have already distributed from these traditional IRAs?	\$	<input style="width: 90%;" type="text"/>

What is the purpose of the the asset resulting from this Roth Conversion? (Circle one)

Accumulation & Distribution to Owner

Accumulation Only

Accumulation & Distribution to heir

Do you prefer to spread the taxes due on the conversion over 2011 and 2012? **YES** **NO**

Please enter a Tax Rate for the Conversion

2011 **2012**

Tax Rate for Tax Split : % %