

# Executive Trifecta® Using Indexed Universal Life

Presented By: [Licensed user's name appears here]

Insured: Tony Jamison

## Plan Sponsor's Summary of Costs and Benefits

Plan Sponsor: Town and Country Auto Group S Corporation

|      |             | Form of Transaction<br>(Key Executive Coverage with<br>Deferred Transfer of Policy<br>To Executive) | Policy Transfer to<br>Executive is Illustrated<br>at Beginning of Year<br>11 | Plan Sponsor's<br>Tax Bracket<br>40.00% | Indexed UL<br>Interest Rate<br>7.00% |  |   |   |  |
|------|-------------|---|--|---|--------------------------------------|--|---|---|--|
| Year | Male<br>Age | (1)<br>Net<br>Payment   | (2)<br>Cumulative<br>Net<br>Payments   | (3)<br>Policy<br>Accum<br>Value*        | (4)<br>Policy<br>Cash<br>Value*      | (5)<br>Portion of<br>Policy<br>Death<br>Benefit<br>Allocated for<br>Key<br>Executive<br>Coverage | (6)<br>Portion of<br>Policy<br>Death<br>Benefit<br>Allocated for<br>Survivor<br>Income<br>Benefit** | (7)<br>Total<br>Policy<br>Death<br>Benefit<br>Required<br>(5) + (6) | (8)<br>Total<br>Policy<br>Death<br>Benefit<br>Provided |
| 1    | 40          | 100,000   | 100,000  | 86,132                                  | 0                                    | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 2    | 41          | 100,000   | 200,000  | 178,454                                 | 72,145                               | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 3    | 42          | 100,000   | 300,000  | 277,360                                 | 172,379                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 4    | 43          | 100,000   | 400,000  | 383,304                                 | 279,649                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 5    | 44          | 100,000   | 500,000  | 496,818                                 | 394,533                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 6    | 45          | 100,000   | 600,000  | 618,522                                 | 517,649                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 7    | 46          | 100,000   | 700,000  | 749,089                                 | 668,416                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 8    | 47          | 0   | 700,000  | 788,562                                 | 728,047                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 9    | 48          | 0   | 700,000  | 831,211                                 | 790,896                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 10   | 49          | 0   | 700,000  | 877,189                                 | 857,031                              | 2,500,000  | 1,753,806   | 4,253,806   | 4,253,806  |
| 11   | 50          | -69,474   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 12   | 51          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 13   | 52          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 14   | 53          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 15   | 54          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 16   | 55          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 17   | 56          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 18   | 57          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 19   | 58          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 20   | 59          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 21   | 60          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 22   | 61          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 23   | 62          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 24   | 63          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 25   | 64          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 26   | 65          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 27   | 66          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 28   | 67          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 29   | 68          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 30   | 69          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
|      |             | 630,526   |  |   |                                      |  |   |   |  |

\*This illustration assumes the nonguaranteed values shown continue in all years. This is not likely, and actual results may be more or less favorable. This illustration is not valid unless accompanied by a basic illustration from the issuing life insurance company.

\*\*Key Executive Coverage and Survivor Income Benefit are terminated at the beginning of year 11 when the policy is transferred to the executive.

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| 31   | 70          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 32   | 71          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 33   | 72          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 34   | 73          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 35   | 74          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 36   | 75          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 37   | 76          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 38   | 77          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 39   | 78          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 40   | 79          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 41   | 80          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 42   | 81          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 43   | 82          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 44   | 83          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 45   | 84          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 46   | 85          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 47   | 86          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 48   | 87          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 49   | 88          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 50   | 89          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 51   | 90          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 52   | 91          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 53   | 92          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 54   | 93          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 55   | 94          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 56   | 95          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 57   | 96          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 58   | 97          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 59   | 98          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
| 60   | 99          | 0   | 630,526  | 0                                       | 0                                    | 0  | 0   | 0   | 0  |
|      |             | <b>630,526</b>  |  |   |                                      |  |   |   |  |

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