

Summary of Distributions

2/18/2019

Calculating Minimum Distributions for Qualified Plan or IRA
 Current Year: 2019
 Year of First Required Distribution: 2038
 First Required Distribution After Rollover: 2052
 12/31/2018 Plan Balance: \$1,500,000.00
 Expected Plan Growth: 5.0000%
 Distributions Taken at Beginning of Each Year
 Is there a Designated Beneficiary?: Yes
 Owner's Birth Date: 1/1/1968
 Beneficiary #1's Birth Date: 1/1/1969
 Beneficiary #1 is Spouse?: Yes
 Oldest's Birth Year: 2000
 Assumed Death of Owner: 2051
 Assumed Death of Spouse: 2058
 Spouse Rolls Over Plan in: 2051
 Spouse Names Beneficiary after the Rollover.

<u>Year</u>	<u>Age</u>	<u>Balance</u>	<u>Life Exp.</u>	<u>Distribution</u>	<u>Total Distributed</u>
2019	51	\$1,500,000.00	33.3	\$0.00	\$0.00
2020	52	\$1,575,000.00	32.3	\$0.00	\$0.00
2021	53	\$1,653,750.00	31.4	\$0.00	\$0.00
2022	54	\$1,736,437.50	30.5	\$0.00	\$0.00
2023	55	\$1,823,259.38	29.6	\$0.00	\$0.00
2024	56	\$1,914,422.35	28.7	\$0.00	\$0.00
2025	57	\$2,010,143.47	27.9	\$0.00	\$0.00
2026	58	\$2,110,650.64	27.0	\$0.00	\$0.00
2027	59	\$2,216,183.17	26.1	\$0.00	\$0.00
2028	60	\$2,326,992.33	25.2	\$0.00	\$0.00
2029	61	\$2,443,341.95	24.4	\$0.00	\$0.00
2030	62	\$2,565,509.05	23.5	\$0.00	\$0.00
2031	63	\$2,693,784.50	22.7	\$0.00	\$0.00
2032	64	\$2,828,473.73	21.8	\$0.00	\$0.00
2033	65	\$2,969,897.42	21.0	\$0.00	\$0.00
2034	66	\$3,118,392.29	20.2	\$0.00	\$0.00
2035	67	\$3,274,311.90	19.4	\$0.00	\$0.00
2036	68	\$3,438,027.50	18.6	\$0.00	\$0.00
2037	69	\$3,609,928.88	17.8	\$0.00	\$0.00
2038	70	\$3,790,425.32	27.4	\$138,336.69	\$138,336.69
2039	71	\$3,834,693.06	26.5	\$144,705.40	\$283,042.09
2040	72	\$3,874,487.04	25.6	\$151,347.15	\$434,389.24
2041	73	\$3,909,296.88	24.7	\$158,271.13	\$592,660.37
2042	74	\$3,938,577.04	23.8	\$165,486.43	\$758,146.80
2043	75	\$3,961,745.14	22.9	\$173,001.97	\$931,148.77
2044	76	\$3,978,180.33	22.0	\$180,826.38	\$1,111,975.15
2045	77	\$3,987,221.65	21.2	\$188,076.49	\$1,300,051.64
2046	78	\$3,989,102.42	20.3	\$196,507.51	\$1,496,559.15
2047	79	\$3,982,224.66	19.5	\$204,216.65	\$1,700,775.80
2048	80	\$3,966,908.41	18.7	\$212,134.14	\$1,912,909.94
2049	81	\$3,942,512.98	17.9	\$220,252.12	\$2,133,162.06

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<u>Year</u>	<u>Age</u>	<u>Balance</u>	<u>Life Exp.</u>	<u>Distribution</u>	<u>Total Distributed</u>
2050	82	\$3,908,373.90	17.1	\$228,559.88	\$2,361,721.94
2051	83	\$3,863,804.72	16.3	\$237,043.23	\$2,598,765.17
2052	83	\$3,808,099.56	16.3	\$233,625.74	\$2,832,390.91
2053	84	\$3,753,197.51	15.5	\$242,141.77	\$3,074,532.68
2054	85	\$3,686,608.53	14.8	\$249,095.17	\$3,323,627.85
2055	86	\$3,609,389.03	14.1	\$255,985.04	\$3,579,612.89
2056	87	\$3,521,074.19	13.4	\$262,766.73	\$3,842,379.62
2057	88	\$3,421,222.83	12.7	\$269,387.62	\$4,111,767.24
2058	89	\$3,309,426.97	12.0	\$275,785.58	\$4,387,552.82
2059	59	\$3,185,323.46	26.1	\$122,043.04	\$4,509,595.86
2060	60	\$3,216,444.44	25.1	\$128,145.20	\$4,637,741.06
2061	61	\$3,242,714.20	24.1	\$134,552.46	\$4,772,293.52
2062	62	\$3,263,569.83	23.1	\$141,280.08	\$4,913,573.60
2063	63	\$3,278,404.24	22.1	\$148,344.08	\$5,061,917.68
2064	64	\$3,286,563.17	21.1	\$155,761.29	\$5,217,678.97
2065	65	\$3,287,341.97	20.1	\$163,549.35	\$5,381,228.32
2066	66	\$3,279,982.25	19.1	\$171,726.82	\$5,552,955.14
2067	67	\$3,263,668.20	18.1	\$180,313.16	\$5,733,268.30
2068	68	\$3,237,522.79	17.1	\$189,328.82	\$5,922,597.12
2069	69	\$3,200,603.67	16.1	\$198,795.26	\$6,121,392.38
2070	70	\$3,151,898.83	15.1	\$208,735.02	\$6,330,127.40
2071	71	\$3,090,322.00	14.1	\$219,171.77	\$6,549,299.17
2072	72	\$3,014,707.74	13.1	\$230,130.36	\$6,779,429.53
2073	73	\$2,923,806.25	12.1	\$241,636.88	\$7,021,066.41
2074	74	\$2,816,277.84	11.1	\$253,718.72	\$7,274,785.13
2075	75	\$2,690,687.08	10.1	\$266,404.66	\$7,541,189.79
2076	76	\$2,545,496.54	9.1	\$279,724.89	\$7,820,914.68
2077	77	\$2,379,060.23	8.1	\$293,711.14	\$8,114,625.82
2078	78	\$2,189,616.54	7.1	\$308,396.70	\$8,423,022.52
2079	79	\$1,975,280.83	6.1	\$323,816.53	\$8,746,839.05
2080	80	\$1,734,037.52	5.1	\$340,007.36	\$9,086,846.41
2081	81	\$1,463,731.67	4.1	\$357,007.72	\$9,443,854.13
2082	82	\$1,162,060.15	3.1	\$374,858.11	\$9,818,712.24
2083	83	\$826,562.14	2.1	\$393,601.02	\$10,212,313.26
2084	84	\$454,609.18	1.1	\$413,281.07	\$10,625,594.33
2085	85	\$43,394.52	0.1	\$43,394.52	\$10,668,988.85
2086	86	\$0.00	0.0	\$0.00	\$10,668,988.85
Total				\$10,668,988.85	