

Roth Conversion Information

Please provide the following information:

1. Name:

2. Date of birth for you and spouse.

3. Fair market value (FMV) of assets held in IRA accounts.

4. FMV of assets held in qualified plan accounts.

5. Liquid assets held for investments outside your qualified plan not set aside for other use (i.e. education funding, disabled child, etc.).

6. Total net worth including all amounts listed above.

7. Will you need to use the Roth account funds in the future as opposed to leaving the funds for future generations?
