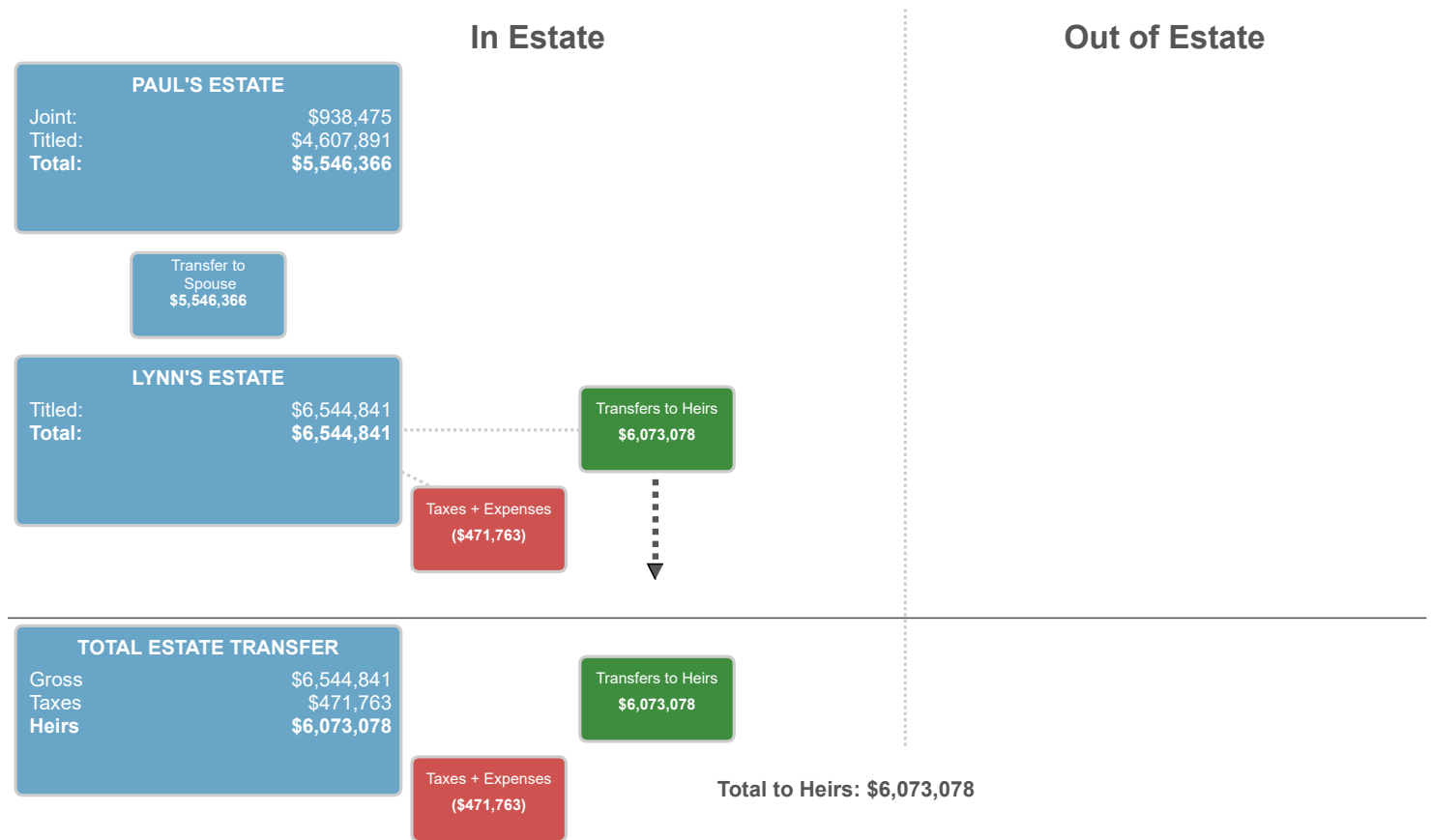


# Estate Flow Chart

Prepared for Paul and Lynn Price



**PAUL'S ESTATE**

**Estate Value**

|                                     |                  |
|-------------------------------------|------------------|
| Inherited IRA from Paul's Dad       | \$194,379        |
| Lynn and Paul Savings               | 50,000           |
| Paul and Lynn's Joint Investments   | 338,475          |
| Paul's Car                          | 50,000           |
| Paul's Car Loan                     | (40,000)         |
| Paul's Price Wealth Advisors 401(k) | 1,153,512        |
| Paul's Term                         | 750,000          |
| Paul's Whole Life                   | 1,000,000        |
| Price Wealth Advisors, LLC          | 1,500,000        |
| Primary Residence                   | 400,000          |
| Shore House                         | 150,000          |
| <b>Estate Value:</b>                | <b>5,546,366</b> |

**Transfers to Spouse**

|                                     |                  |
|-------------------------------------|------------------|
| Inherited IRA from Paul's Dad       | \$194,379        |
| Lynn and Paul Savings               | 50,000           |
| Paul and Lynn's Joint Investments   | 338,475          |
| Paul's Car                          | 50,000           |
| Paul's Car Loan                     | (40,000)         |
| Paul's Price Wealth Advisors 401(k) | 1,153,512        |
| Paul's Term                         | 750,000          |
| Paul's Whole Life                   | 1,000,000        |
| Price Wealth Advisors, LLC          | 1,500,000        |
| Primary Residence                   | 400,000          |
| Shore House                         | 150,000          |
| <b>Transfers to Spouse:</b>         | <b>5,546,366</b> |

**LYNN'S ESTATE**

**Estate Value**

|                               |           |
|-------------------------------|-----------|
| Inherited IRA from Paul's Dad | \$194,379 |
| Lynn and Paul Savings         | 100,000   |
| Lynn's Car                    | 30,000    |

|                                     |                  |
|-------------------------------------|------------------|
| Lynn's Car Loan                     | (20,000)         |
| Lynn's Whole Life                   | 50,000           |
| Paul and Lynn's Joint Investments   | 676,950          |
| Paul's Car                          | 50,000           |
| Paul's Car Loan                     | (40,000)         |
| Paul's Price Wealth Advisors 401(k) | 1,153,512        |
| Paul's Term                         | 750,000          |
| Paul's Whole Life                   | 1,000,000        |
| Price Wealth Advisors, LLC          | 1,500,000        |
| Primary Residence                   | 800,000          |
| Shore House                         | 300,000          |
| <b>Estate Value:</b>                | <b>6,544,841</b> |
| <b>Transfers to Heirs</b>           |                  |
| Michael Price                       | \$3,036,539      |
| Stacy Price                         | 3,036,539        |
| <b>Transfers to Heirs:</b>          | <b>6,073,078</b> |
| <b>Taxes &amp; Expenses</b>         |                  |
| Income Tax on IRD                   | (\$471,763)      |
| <b>Taxes &amp; Expenses:</b>        | <b>(471,763)</b> |

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This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/ representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.

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