

# LegacyPlan Illustration Worksheet

\* Charitable Advisor: Kenneth Wheeler State: FL Date: \_\_\_\_\_  
\* 1<sup>st</sup> Seller/Annuitant: \_\_\_\_\_ State of Residence: \_\_\_\_\_ DOB/Age: \_\_\_\_\_  
\* 2<sup>nd</sup> Seller/Annuitant: \_\_\_\_\_ State of Residence: \_\_\_\_\_ DOB/Age: \_\_\_\_\_  
\* Annual Income: \_\_\_\_\_ Total Net Worth: \_\_\_\_\_  
\* Frequency of Payment:    \_\_\_ Monthly       \_\_\_ Annually  
\* Payment Begins:       \_\_\_ Immediate     \_\_\_ Deferred # of Years \_\_\_\_\_  
\*  Term Certain LegacyPlan # of Years \_\_\_\_\_    1 or 2 Life LegacyPlan

## Asset Information

**Securities** Estimated Market Value \_\_\_\_\_ Cost Basis: \_\_\_\_\_  
 **Real Estate** Estimated Market Value: \_\_\_\_\_ Cost Basis: \_\_\_\_\_  
Mortgage Balance (if any): \_\_\_\_\_ Age of Mortgage: \_\_\_\_\_  
Type of Depreciation (if any)    Straight line    Accelerated  
Type of Property:    Single Family        Multi-Family        Land  
                           Commercial        Rental  
 **Annuity** (must be non-qualified)   Annuity Company \_\_\_\_\_  
Accumulation Value: \_\_\_\_\_ Surrender Value: \_\_\_\_\_  
Cost Basis: \_\_\_\_\_  
Surrender Length (years) \_\_\_\_\_ Issue Date: \_\_\_\_\_  
 **Cash** Amount \_\_\_\_\_

## Miscellaneous

Notes: \_\_\_\_\_  
\_\_\_\_\_

Objective: \_\_\_\_\_  
\_\_\_\_\_

Charitable Objective: \_\_\_\_\_

20170825

**\* Required information for illustration purposes**

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