For Office Use Only

Approved: ____________

Date Sent: ____________

Senior Tax Solutions LLC

"Tax What If" Programs

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1040 Tax What If.. Program Only	☐	**$299 Yr**
With Case Design & Tax Question Support	☐	**$499 Yr**
Retirement Planner.. Program Only	☐	**$299 Yr**
With Case Design & Tax Question Support	☐	**$499 Yr**

1040 Tax "What If" Progarm

- Create a **"Current and Revised What If"** Report, show:
  - Tax Bracket Management
  - Roth Conversions
  - Tax Free Distributions
  - Taxable Social Security Benefits
  - Shows Social Security Provisional Income
  - RMD Tax Impact
  - Capital Gains Taxation
  - Reducing Interest and Dividend Income
  - Medicare Means Testing (if premiums will be increased)
  - Net Investment Tax (3.8% Medicare Tax on Investment Income)
  - And Much More
- **Future "What If" Planning Section**
  - Choose Future Tax Year
  - Increase Tax Rates
  - Index Tax Bracket Amount to inflation
  - Index Deductions to inflation
  - Death of Spouse Forecasting, compare MFJ to Single
- **Multi "What If" Planning Scenarios**
  - Create up to **6** different **"What If's"** in a single file
  - ***Create up to 6 different Tax Years***
- **Client Reports**
  - One Page Before and After
  - Simplified General Overview
- **Other Features**
  - Itemized Deductions Worksheet
  - Tax Estimator (Calculate Tax Due or Refund)
  - State Income Tax Estimator

Retirement Distribution Planning Program

- **Retire "What If" Planning Calculator:**
  - Create a quick "What If" to see if client has enough assets
  - Create up to 4 different scenario's per client
  - See Retirement Picture based on client's income needs & assets
  - Show the "Impact" inflation, market adj & taxes have long term
  - Separate assets by safe and risk, assign different rates of return
  - Adjust assets & rates of return
  - Adjust income, income needs & taxes
  - Use as an Income Ledger by itself
  - Separate Income Ledger
  - Separate Asset Ledger
  - **Red Line shows if there assets run out**
- **Advanced Account Ledger & Mini Income Planner**
  - 6 different accounts or buckets
  - Enter asset balance,contributions, distributions,
  - Separate assets by safe and risk, assign different rates of return
  - Adjust for market adjustments, rates of return, tax rates, etc
  - Change order of distributions between, safe, risk or blend
- **QLAC "What If" Calculator:**
  - Compares Full RMD Vs RMD w/QLAC
  - Shows Income continuing even if account goes to "Zero"
- **S&P 500 Sequence of Returns Risk Calculators:**
  - Can show Increasing returns Vs Decreasing returns in early yrs
  - Compare 25 yr S&P performance Vs. Traditional Fixed
  - Compare 4 different examples of 25 yr S&P performance
  - Can choose year to start
  - Choose withdrawal %
  - Choose COLA %
  - Income Rider Option

- **Case Design Support**
  - Get help correctly putting together your strategy or concept
  - Send your case specs, outline your strategy,schedule a time
- **Tax Questions Support**
  - Financial services and taxes are intertwined
  - Let us help you with you and your clients tax questions
  - Stop a problem before it becomes a problem you can't fix

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- **Excel Based Program** (Need a later version of Excel)

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