

IntelliConnect® Roth IRA Conversion Expert™

Quickly calculate and evaluate a variety of IRA conversion scenarios with one, robust software tool.

Expert Explanation and Guidance on Roth IRA Conversion Planning • Mathematical and Conversion Analysis • Practitioner and Client Education Materials

Roth IRA Conversion Expert™ provides tax practitioners with comprehensive Roth IRA analysis and implementation guidance to convert a traditional IRA to a Roth IRA successfully and efficiently. Developed in connection with Robert S. Keebler and Stephen J. Bigge of Baker Tilly Virchow Krause, LLP, this tool allows users to quickly analyze a variety of conversion options based on different rates of return and various tax rates upon withdrawal, compare results of different scenarios and compile client reports with one, easy-to-use tool. With the Roth IRA Conversion Expert, you'll have access to educational guidance, practice management materials and the Roth IRA Conversion Evaluator™.

Practitioner Guidance

- Roth IRA conversion planning basics — explanation of critical strategic factors and tactical considerations that drive Roth IRA conversion planning
- Conversion benefit information — income tax and estate tax reasons why a taxpayer may benefit from a Roth IRA conversion
- Guidance through the complexities of Roth IRA conversions — complete information to prepare the professional to effectively advise clients regarding Roth IRA conversions
- *Advising Clients on Roth IRA Conversions — Strategies and Tactics* webinar by Robert S. Keebler

Practice Management

- Marketing letter
- Engagement letter
- Checklist for seamless conversions
- Educational materials and presentations for clients

Roth IRA Conversion Evaluator™

This user-friendly Roth IRA analysis software provides:

- Automatic calculations to illustrate up to six conversion options
- Retirement asset worksheets
- Income tax and cash flow worksheets
- Variance and step analysis summaries
- Net-to-family comparison charts

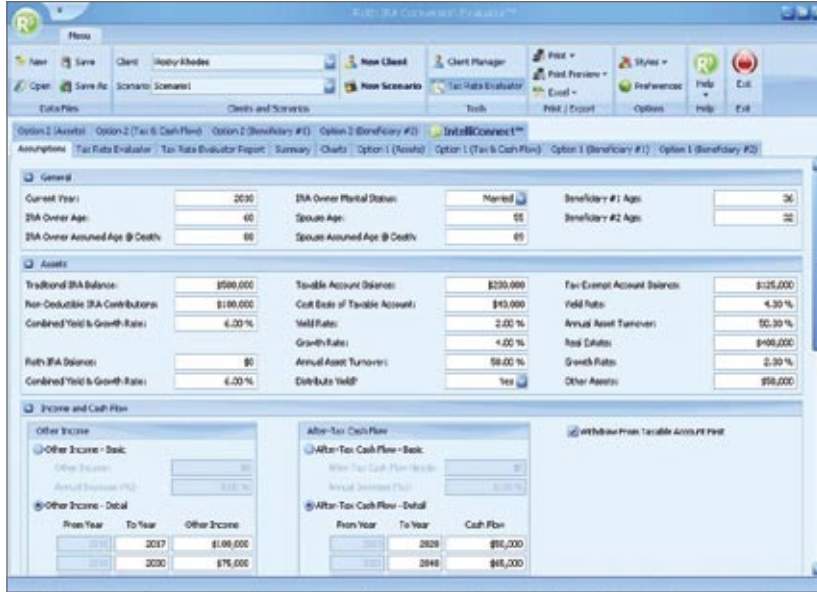
Easy-to-Use Interface

- Group and save conversion analysis and scenarios by client
- Compare client options with user-friendly charts and summaries
- Export client data and various conversion options directly to Microsoft® Excel®

Roth IRA Conversion Evaluator™ Enhancements

We have added more features to the Roth IRA Conversion Evaluator™, the software component of the Roth IRA Conversion Expert™, to help you more effectively advise your clients regarding Roth IRA conversions. With the new enhancements, you will be able to:

- Accommodate analysis beyond the life of the current IRA owner ("Stretch IRA")
- Allow for varying income and tax rates during the term of one scenario
- Permit additional input(s) to reflect basis in a non-deductible IRA
- Enable additional input(s) to reflect tax-exempt assets in an investment account
- Provide an enhanced Code Sec. 691(c) calculation-accounting for the deduction not only at death but also during the "stretch" period
- Print/export the results of the Tax Rate Evaluator tab



The Roth IRA Conversion Evaluator™ features a user-friendly interface.



View Net-to-Family charts that compare your conversion options using bar and line charts at 10 years, 20 years and 30 years.



	OPTION 1	OPTION 2	OPTION 3	OPTION 4	OPTION 5	OPTION 6	S.D.	% Δ
YEAR 10								
Total Assets	\$ 2,291,430	\$ 2,140,976	\$ 2,124,340	\$ 2,032,158	\$ 2,044,888	\$ 2,013,080		
Less: 'Walk-In' Income Tax on Traditional IRA	(174,300)	(170,340)	(169,000)	(167,991)	(167,991)	(167,991)		
Net Assets	\$ 2,117,130	\$ 1,970,636	\$ 1,955,340	\$ 1,864,167	\$ 1,876,897	\$ 1,845,089		0.82%
YEAR 20								
Total Assets	\$ 3,287,786	\$ 3,281,653	\$ 3,214,200	\$ 3,100,400	\$ 3,163,481	\$ 3,120,791		
Less: 'Walk-In' Income Tax on Traditional IRA	(213,907)	(174,420)	(127,050)	(87,200)	(101,480)	(101,480)		
Net Assets	\$ 3,073,879	\$ 3,107,233	\$ 3,087,150	\$ 3,013,200	\$ 3,062,001	\$ 3,019,311		0.74%
YEAR 30								
Total Assets	\$ 4,870,700	\$ 4,870,413	\$ 4,803,300	\$ 4,720,420	\$ 4,720,720	\$ 4,720,362		
Less: 'Walk-In' Income Tax on Traditional IRA	(174,300)	(170,340)	(169,000)	(167,991)	(167,991)	(167,991)		
Net Assets	\$ 4,696,400	\$ 4,700,073	\$ 4,634,300	\$ 4,552,429	\$ 4,552,729	\$ 4,552,371		0.81%
YEAR 40								
Total Assets	\$ 7,198,360	\$ 7,210,028	\$ 7,438,000	\$ 7,099,100	\$ 7,220,120	\$ 7,089,032		
Less: 'Walk-In' Income Tax on Traditional IRA	(284,241)	(283,617)	(179,240)	(119,800)	(169,480)	(169,480)		
Net Assets	\$ 6,914,119	\$ 6,926,411	\$ 7,258,760	\$ 6,979,300	\$ 7,050,640	\$ 6,919,552		1.03%
YEAR 50								
Total Assets	\$ 11,019,020	\$ 11,079,048	\$ 11,720,100	\$ 12,120,000	\$ 12,010,100	\$ 12,060,210		
Less: 'Walk-In' Income Tax on Traditional IRA	(127,480)	(127,420)	(79,211)	(50,800)	(70,430)	(70,430)		
Net Assets	\$ 10,891,540	\$ 10,951,628	\$ 11,640,889	\$ 12,069,200	\$ 11,939,670	\$ 11,989,780		0.54%

View the Variance and STEP Analysis by percentage and dollar amount with the summary tab.

To learn more about the Roth IRA Conversion Expert™, please contact your CCH Account Representative at 888-CCH-REPS (888-224-7377) or visit CCHGroup.com

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