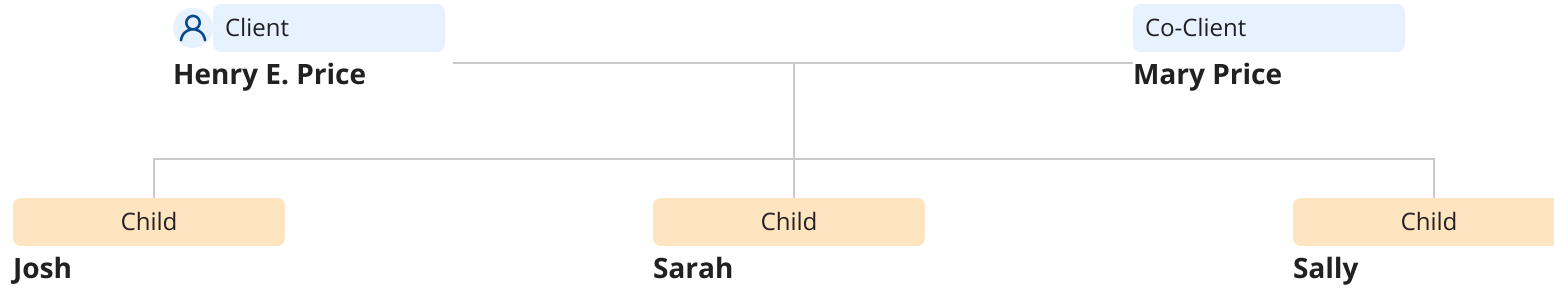


Henry E. & Mary Price

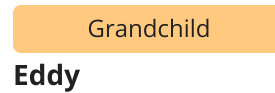
Estate Planning Lab

Household Summary

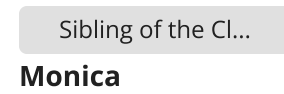
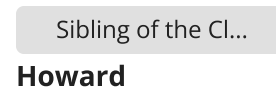
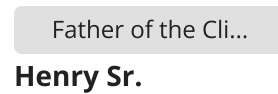
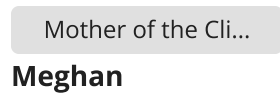
State **Oregon** 



Grandchildren



Others

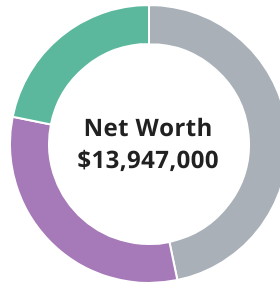


Balance Sheet - Today

Revocable Irrevocable

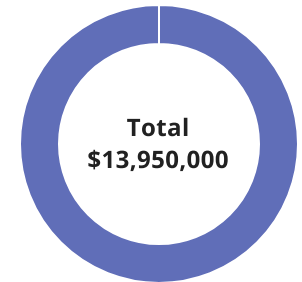
Ownership Breakdown

Henry	46.73%	\$6,517,000
Mary	31.4%	\$4,380,000
Joint	21.87%	\$3,050,000
Total	100%	\$13,947,000



Estate Breakdown

Inside Estate	100%	\$13,950,000
Outside Estate	0%	\$0
Total	100%	\$13,950,000



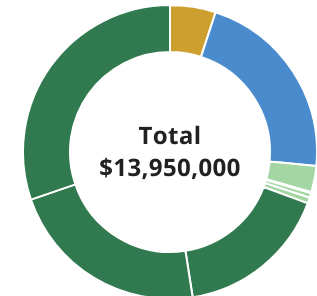
Estate Assets

Inside

Name	Henry	Mary	Joint	Total
Main Home	\$0	\$0	\$700,000	\$700,000
Really Great Business	\$3,000,000	\$0	\$0	\$3,000,000
Henry Trad IRA	\$400,000	\$0	\$0	\$400,000
Henry Roth IRA	\$20,000	\$0	\$0	\$20,000
Mary Roth IRA	\$0	\$70,000	\$0	\$70,000

Continues on next page →

Inside Estate



Real Estate	5.02%
Business	21.51%
Retirement	4.16%
Non Retirement	69.32%

Henry E. & Mary Price

Estate Planning Lab (2/3)

Continued ↩

🔒 Revocable 🔒 Irrevocable

Name	Henry	Mary	Joint	Total
■ Mary 401k	\$0	\$90,000	\$0	\$90,000
🔒 ■ Joint Savings	\$0	\$0	\$2,350,000	\$2,350,000
🔒 ■ Henry Brokerage	\$3,100,000	\$0	\$0	\$3,100,000
🔒 ■ Mary Brokerage	\$0	\$4,220,000	\$0	\$4,220,000
Total	\$6,520,000	\$4,380,000	\$3,050,000	\$13,950,000

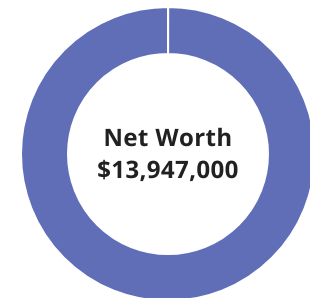
Inside Estate

See the graph on the first page

Liabilities

Name	Henry	Mary	Joint	Total
■ Personal Loan	\$3,000	\$0	\$0	\$3,000
Total	(\$3,000)	(\$0)	(\$0)	(\$3,000)

Liabilities Breakdown



■ Loans	0.02%
■ Inside Estate	100%
■ Outside Estate	0%

Henry E. & Mary Price

Estate Planning Lab (3/3)

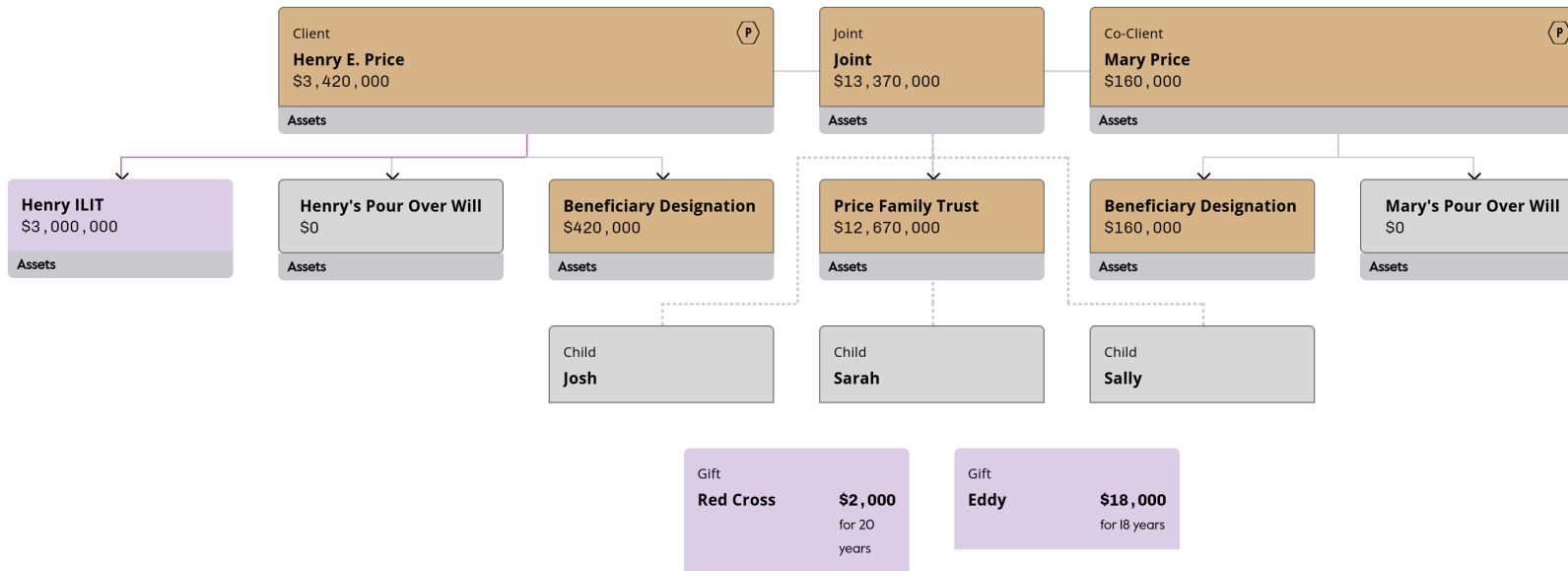
 Revocable  Irrevocable

Totals

	Henry	Mary	Joint	Total
Current Total Estate	\$6,517,000	\$4,380,000	\$3,050,000	\$13,947,000

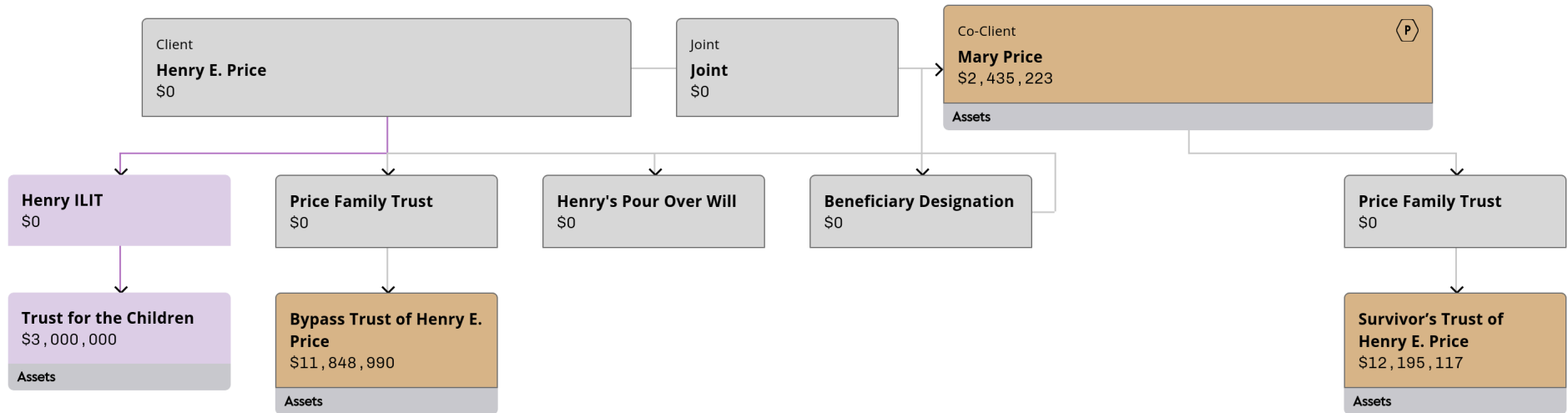
Henry E. & Mary Price

Scenario 1 Today view



Henry E. & Mary Price

Scenario 1. First Death

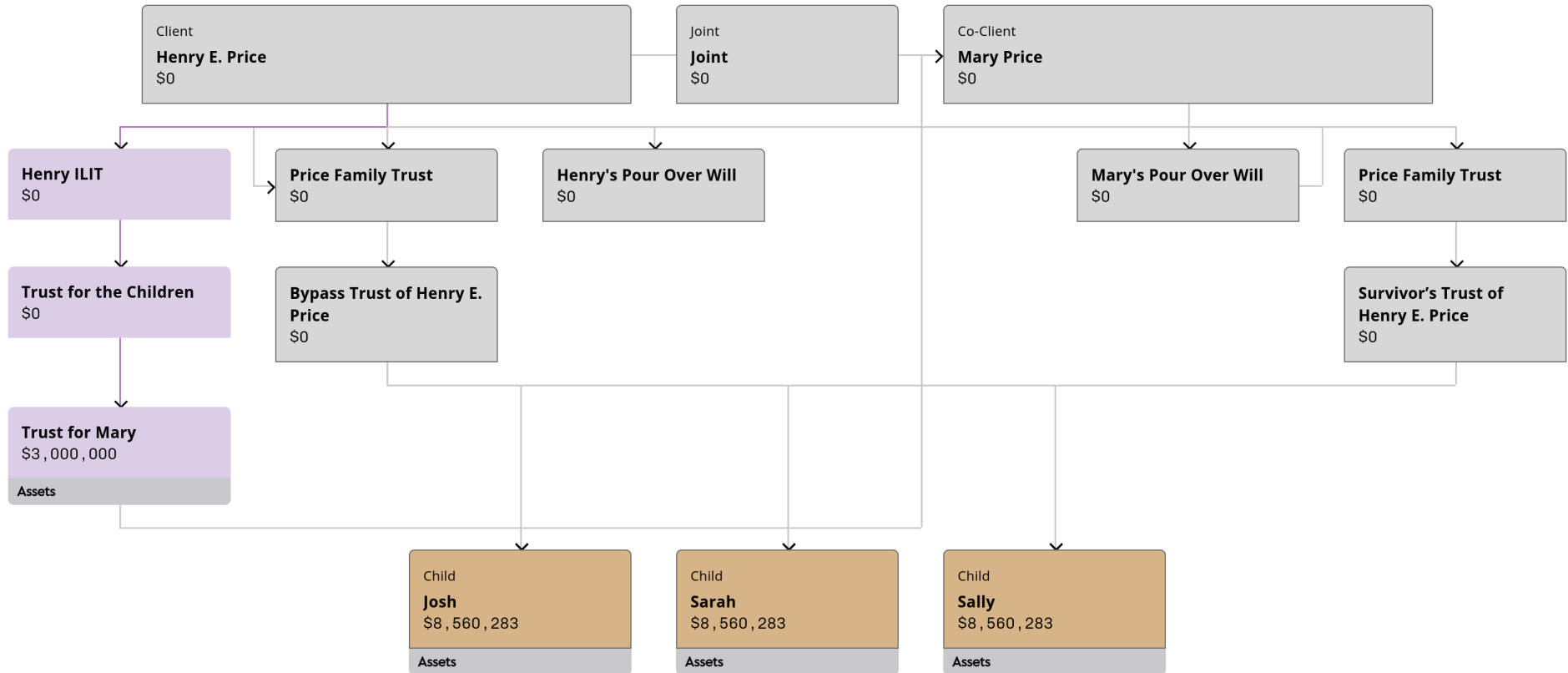


Henry E. & Mary Price

Scenario 1 First Death | How Assets Are Transferred

Beneficiaries	Relationship	Assets Received
Henry E. Price (Probate)	Client	\$0
Mary Price	Co-Client	\$2,435,223
Trust for the Children	-	\$3,000,000
Bypass Trust of Henry E. Price	-	\$11,848,990
Survivor's Trust of Henry E. Price	-	\$12,195,117
Total		\$29,479,330

Scenario 1. Second Death



Henry E. & Mary Price

Scenario 1 Second Death | How Assets Are Transferred

Beneficiaries	Relationship	Assets Received
Henry E. Price (Probate)	Client	\$0
Mary Price (Probate)	Co-Client	\$0
Josh	Child	\$8,560,283
Sarah	Child	\$8,560,283
Sally	Child	\$8,560,283
Total		\$25,680,849

Henry E. & Mary Price

Scenario 1 Taxes

Henry's Taxable Estate (2076) (First Death)

Federal Taxes	\$1,651,681
Taxable Estate	\$12,195,117
Miscellaneous exclusions	\$0
Gift Strategy	\$0
State Estate Tax	\$565,914
Federal Exemption	\$7,500,000
Net Taxable Estate	\$4,129,203
Federal Estate Tax Rate	40.00%
State Taxes - Oregon	
Taxable Estate	\$12,195,117
Miscellaneous exclusions	\$6,000,000
Gift Strategy	\$0
State Exemption	\$1,000,000
Marginal State Estate Tax Rate	12.00%
Net Taxable Estate	\$6,195,117

Mary's Taxable Estate (2078) (Second Death)

Federal Taxes	\$0
Taxable Estate	\$14,728,105
Miscellaneous exclusions	\$0
Gift Strategy	\$364,000
State Estate Tax	\$1,800,757
Federal Exemption	\$13,990,000
Net Taxable Estate	\$0
Federal Estate Tax Rate	40.00%
State Taxes - Oregon	
Taxable Estate	\$14,728,105
Miscellaneous exclusions	\$0
Gift Strategy	\$364,000
State Exemption	\$1,000,000
Marginal State Estate Tax Rate	16.00%
Net Taxable Estate	\$14,364,105

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