

Preliminary Tax Related Benefits Illustration

Introduction

This illustration was prepared utilizing select information from prior year tax filings and Client confidential information (including certain proprietary future years' estimates and projections where applicable). Where current tax returns are not available, it is presumed current financial information is consistent with the treatment and filing of prior year tax returns, as adjusted. All the information required to perform the analysis in this illustration was provided to STA by Client and/or Client's key management personnel, all sources deemed to be reliable. No attempt has been made to verify the accuracy or completeness of this information, and any significant errors in or omissions from the information furnished would have a corresponding material affect on the analysis and the conclusions derived.

Estimated Savings

Prepared For: Joe & Mary Johnson

Estimated First Full Year Benefit	sample - sample
Estimated Five Year Cumulative Benefit	sample - sample
Estate/Inheritance Tax & Fees	sample - sample

Client Provided Details

Officer W-2 Wages	Historic: \$64,487 Illustration: \$70,000	Historic Revenue and Profit	Revenue: \$1,315,660 Profit: \$121,144
Sales Growth Estimates	2015: 5%, 2016: 5% 2017: 5%, 2018: 5%	Illustration Revenue and Profit	Revenue: \$1,500,000 Profit: 5%
Gross Estate	Current: \$1,790,000 Growth: 3%	Year of Estate Review	Will: N/A Trust: N/A

Notes

The analysis and conclusion in this illustration reflect the application of existing Statutes, IRS: Regulations, Committee Reports, Revenue Rulings, Interpretation Memorandums, and applicable Case Law. NO consideration has been given to proposed legislation.

This illustration reflects preliminary projections anticipated to be effectuated through a combination of tax savings, tax deferrals, cost savings, and profit enhancements ("Savings"). The actual Savings, estimated tax exposure, and asset protection values may vary from those shown.