



Should You Convert to a Roth IRA?

Are you wondering if you should convert your Traditional IRA into a Roth IRA? If so, then please take a few moments to answer the following questions.

Name _____

Your age in year of conversion _____

Do you have a spouse? _____

State of Residence _____

Tax Filing Status _____

Estimated total household income \$_____

Eligible account balances \$_____

Do your eligible balances include any after tax contributions? _____

Do you expect to pay the federal Alternative Minimum Tax? _____

Your deductions, credits and adjustments \$_____

Your taxable income \$_____

In how many years after conversion would you begin withdrawals? _____

Will you use eligible IRA balances to pay taxes on this conversion? _____

Will you take advantage of the 2010 2-year tax deferral? _____

Once complete, please fax this form back to us at 610-337-7644, or mail it to our office at 555 Croton Rd. Suite 210 King of Prussia, PA 19406, and we will contact you.