CARLILE PATCHEN & MURPHY LLP
ROTH IRA CONVERSION INFORMATION WORKSHEET

Beginning in 2010, anyone may convert a Traditional IRA to a Roth IRA, regardless of household income. Several considerations must be taken into account when determining if conversion is right for you. This is not a simple decision, which we explain in our November 2009 *The Wealth Planner* newsletter article titled "Weighing the Options: Should you Convert a Traditional IRA to a Roth IRA in 2010 and Beyond?" available at www.cpmlaw.com/services/family-wealth-and-estate-planning/articles-and-resources. As your estate and business planning attorneys, we are well-positioned to help you make the decision that is consistent with your estate and business plan and most advantageous to your overall financial well-being. If you would like our advice, please call your CPM attorney to make an appointment. We have structured a modest fixed fee for this important service. You should fill out this form as completely as possible and bring it to your first meeting.

IRA Owner

Name:_____________________________

Date of Birth:______________________

Phone Number:_____________________

Retired? Yes / No

If No, Anticipated Age @ Retirement: ____

Spouse's Name:___________________

Spouse's Date of Birth:_____________

Children's Names and Dates of Birth:

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IRA Information

Current Traditional IRA Balance: $___________

Primary Beneficiary (include date of birth): ___________________________________

Contingent Beneficiary(ies) (include date of birth): ______________________________

____________________________________ ____________________________________

Anticipated Taxable Income

2010 $_______________ 2011 $_______________ 2012 $_______________

Assets & Liabilities

Assets & Liabilities	Estimated Present Market Value (IRA Owner)	(Spouse)	(Joint)
Cash			
Bank Accounts (Checking, Savings, CDs)			
Stocks & Bonds			
Real Estate			
Business Interests			
Other Retirement Plans			
Other Property			
Life Insurance (Is any of it in Trust?)			
Notes, Mortgages Payable & Other Debts			
Totals			

CPA's Name ________________________________ Phone #: _______________________________

Financial Advisor's Name ____________________ Phone #: _______________________________