

Coleman Consulting Corp.
One Penn Plaza
New York NY 10119

(212)629-8940

February 3rd 2023

CJ Coleman
Coleman-Pension.Com
180 Central Park South
New York NY 10019

RE: Coleman-Pension.Com
Retirement Plan and Trust

Dear Mr. Coleman:

Thank you for giving Coleman Consulting Corporation the opportunity to propose the above mentioned plan for you. Enclosed please find the following information:

- o Pension Plan Proposal.
- o Introduction to Coleman Consulting Corp.,
- o Confidential Business Request Package.

Please keep this information for your future reference. We look forward to meeting with you to discuss the installation of your Pension Plan. Should you have any questions or need any additional information, please do not hesitate to contact me.

Sincerely,

CJ Coleman

CJC:fo
Encl.

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RE: Coleman-Pension.Com
Retirement Plan and Trust

Dear Mr. Coleman:

We are contacting you regarding your retirement plan contribution which may not be required until the seventh month after the plan year ends. However, your accountant or tax return preparer may need the contribution amount prior to the filing of your corporate, partnership and/or personal return.

The contribution for this plan year is a minimum of \$0 and a maximum of \$285,296. Since our records show that you have already contributed \$0 toward this plan year, the outstanding amount due is a minimum of \$0 and a maximum of \$285,296.

Please send us the date and the amount of the required contribution. Should you have any questions or need additional information, please feel free to contact me.

Sincerely,

CJ Coleman

CJC:fo
Encl.

COLEMAN-PENSION.COM

SUMMARY OF PLAN PROVISIONS & ACTUARIAL ASSUMPTIONS

EFFECTIVE DATE : 01/01/21
VALUATION DATE : 12/31/23
EMPLOYER ID NUMBER : 13-1234567
PLAN NUMBER : 001

ELIGIBILITY : Minimum Age 21
Minimum Service 1 year

NORMAL RETIREMENT : Attainment of Age 62
and 5 years of Participation.

BENEFIT FORMULA : 100 percent of compensation.
Total benefit reduced for less than 25 yrs Service.
Maximum monthly pension is Section 415 limits.
The number of years for averaging salary is 3.

NORMAL FORM : Joint and Survivor Annuity.

VESTING : - - - Vesting Schedule - - -

Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Percent	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

EARLY RETIREMENT : Attainment of age 55
and 10 years of service

DEATH BENEFIT : Present value of total accrued benefit upon death.
(Plus Life Insurance Proceeds, if any)

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SCHEDULE OF BENEFITS

	----- AGE -----				ANNUAL	MONTHLY	ACCRUED
	EA	PA	AA	RA	SALARY	PENSION	BENEFIT
1 COLEMAN, CJ	30	55	55	62	280,000	18,750	14,648.44
TOTALS					280,000	18,750	14,648.44

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COLEMAN-PENSION.COM
ACTUARIAL VALUATION

	Proj. Mo. Pension	Amount Req. at N. Ret.	PV of Benefits	Total Cost
1 COLEMAN, CJ	18,750	2,852,951	1,584,016	285,296
PLAN TOTALS	18,750	2,852,951	1,584,016	285,296