

DOCTORS ECONOMIC RESEARCH PROJECT

DOCTORS EARNINGS AND SAVINGS LOSS TEST

1. Estimate your monthly **after-tax** lifestyle costs for food, clothing, entertainment, car expense, mortgage payments or rent, educational costs for children, and other personal expenses:

(1) Estimated monthly **after-tax** lifestyle costs: \$ _____
(This figure does not have to be 100% accurate. Come within material accuracy of plus or minus 20%.)

2. Multiply monthly **after-tax** lifestyle costs (1) times 20 to estimate annual taxable compensation you need to provide for your after tax monthly lifestyle costs in a 40% average combined state and federal tax bracket.

(1) _____ x 20 = (2) _____

3. Estimate your annual **pre-tax** practice income and add to that any **pre-tax** interest, dividend, or rental income and any **pre-tax** income generated by your spouse to calculate your total pre-tax income.

Your pre-tax practice income: + _____

Your pre-tax, interest, dividend
and rental income: + _____

Spouse's pre-tax income: + _____

TOTAL PRE-TAX INCOME (3) _____

4. Subtract compensation need (2) from total pre-tax income (3):

Total pre-tax income: (3) _____

Minus compensation need: -(2) _____

SURPLUS PRE-TAX EARNINGS (4)

Multiply surplus pre-tax earnings (4) times 40% to calculate your estimated LOSS TO UNNECESSARY INCOME TAXES THIS YEAR (5).

(4) _____ x .40 = (5)

***Your Loss to Unnecessary
Income Taxes This Year**

(5) \$ _____

6. Do you control \$250,000, or more, of personal and qualified retirement plan savings or other equity assets?
Yes No

*Doctors who have \$30,000 or more of predictable pre-tax surplus earnings (question 4), and have some control over their employer, and/or who have \$250,000 of equity assets under their control (question 6) qualify for participation in the New Economic Order Planning Program. Doctors who have less than \$30,000 of projected pre-tax surplus earnings may also qualify for participation in the New Economic Order Planning Program if they control \$250,000, or more, of personal and qualified retirement plan savings or other equity assets.

Doctors' Planning Program Participation Form

On a scale of 1-5, where 1 is the most important and 5 the least important, please indicate how important each of the following New Economic Order Planning Program components are to you.

1	2	3	4	5	Economics of Life Education
1	2	3	4	5	Earnings Management/ Budgeting
1	2	3	4	5	Capital Accumulation Planning
1	2	3	4	5	Earnings Management Income Tax Reduction
1	2	3	4	5	Critical Illness Protection
1	2	3	4	5	Savings Multiplication
1	2	3	4	5	Student Loan Repayment Management
1	2	3	4	5	Guaranteed Retirement Income Program Planning

I wish to participate in the New Economic Order Planning Program. I understand that my participation includes links to the Doctors' Economic Education Program and the completion of a New Economic Order Planning Program Capital Accumulation or Capital Distribution Plan. Call me to set an appointment to collect the necessary data.

Please contact me by: text message phone
 Best day(s) to call: Mon Tue Wed Thu Fri Sat Sun
 Best time(s) of day to call: Morning Noon Afternoon Evening

Name _____

	First Name	Initial	Last Name	Degree
Home Address _____	Street	City	State	Zip
Office Address _____	Street	City	State	Zip
E-Mail Address _____				

Cell Phone () _____

Send program materials to: Email Address Other

Payment \$975.00*

Check: payable to: ASK Consulting, LLC, 1820 Avenida del Mundo #1603, Coronado, CA, 92118. ASK, LLC is the third party administrator for The Doctors Economic Research Project.

MasterCard American Express Discover Visa

Billing Zip Code _____ Security Code

Number

 Exp. Date _____

Authorized Signature _____ Date _____