

Project Name]

PROJECT FUNDING

Message: To manage Sources, Uses, Tax Credits & Incentives for your project, please assign a primary program to your project.

Projected Units

Counted: 80 Assisted: 21 Not Applicable: 21 Total: 101 Project: xxxxxxxxxx

Projected Gross Square Footage

Residential: 96,451 Commercial: 0 Community Facility: 0 Open: XXXXX Parking: C15 Total: 96,451

Project has only permanent sources

Construction Sources

Table with 7 columns: Category, Source Name, Lender, Funding Type, Total Amount \$, Per Project DU \$, Per Res SF \$. Rows include City Subsidy, Private, Other Public, and Total Development Cost \$.

Project Name

APPRAISAL

Add Appraisal

Form with fields: Site\* (Public), Appraisal Type\* (As Is), Value \$ \*, Date \*, Source (Developer), and an Add button.

List of Appraisals

Table with 5 columns: Site, Appraisal Type, Value \$, Date, Source. Rows include Private (As Built) and Public (As Is).

Project Name

PROJECT DEFINITION

Project Name \* [Required] AKA Project Name:

Unit Projections

Counted Assisted Not Applicable Total Project XXX,XXX,XXX,XXX XXX,XXX,XXX,XXX

Gross Square Footages

Residential Commercial Community Facility Open Parking Total XXX,XXX,XXX,XXX

Projected Start Date [Missing Info] Selection Method

Save

Go to Project View

Assign Programs

Project View - [Project Name]

- Overview Sites Project Team Aff & Dist Summary Project Funding Disabled Advanced Options

- Sources Uses Tax Credits & Incentives

Tax Credits

Table with 5 columns: Type, Organization, Annual Allocation \$, Raise \$, Tax Credit Equity \$. Rows include 4% LIHTC, SLIHC, and Historic.

Tax Incentives

Table with 6 columns: Program Name, Length of Benefit (Yr), Value in Year 1 \$, Cumulative Benefit \$, NPV Of Benefit \$, NPV Per DU \$. Row includes 420c.

Add Tax Credits & Incentives

Welcome! In this guide you will discover the benefits of saving for retirement and why it is important to start moving in the right direction today.



Discover  
The benefits.



Calculate  
How much you need.



Start Moving  
In the right direction.

Begin

1 Discover the benefits.

2 Calculate how much you need.

3 Start moving in the right direction.



Have Questions?  
Call (877) 318-7712

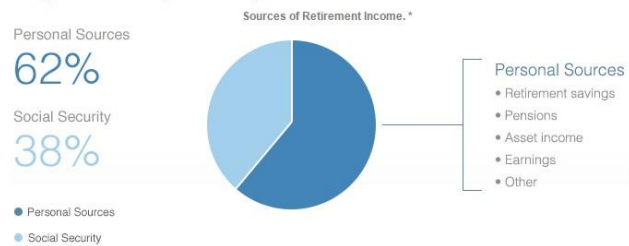
Narration



There are many reasons you should save for your retirement through your 401(k) plan.

### Reason 1: It's up to you to save for your future.

Some financial experts say you'll need 80% of your pre-retirement income to maintain your standard of living in retirement. This is your income replacement percent. Where will it come from?



\* Source: Social Security Administration. Fast Facts & Figures about Social Security, 2011

Enroll Now

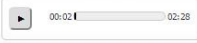
Continue

- 1 Discover the benefits.
- 2 Calculate how much you need.
- 3 Start moving in the right direction.



Have Questions?  
Call (877) 318-7712

Narration



### Reason 2: It costs less than you think.

With a traditional 401(k) plan, contributions are made before federal income taxes are withheld. This reduces your current federal taxable income, which lowers the actual impact of contributing on your paycheck.

Your plan may also offer an after-tax or Roth 401(k) option.

Traditional 401(k)	Roth 401(k)
<ul style="list-style-type: none"> <li>Contribute with <b>Before-tax dollars</b></li> </ul>	<ul style="list-style-type: none"> <li>Contribute with <b>After-tax dollars</b></li> </ul>
<ul style="list-style-type: none"> <li>Both your contributions and earnings are federal income tax-deferred until distribution.</li> </ul>	<ul style="list-style-type: none"> <li>Your contribution is taxable in current year, but all your earnings may be tax free at distribution.</li> </ul>
<ul style="list-style-type: none"> <li>Your federal taxable income is reduced by your contribution amount, so it costs less than you think.               <ul style="list-style-type: none"> <li>Income taxes paid at withdrawal</li> <li>Distributions are typically available at age 59 ½ or termination of employment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Qualified withdrawals are income tax-free, provided you had the account for at least five years and you are:               <ul style="list-style-type: none"> <li>at least age 59 ½</li> <li>disabled or deceased.</li> </ul> </li> </ul>

\*Tax law requirements must be met.

Disclaimer

Enroll Now Continue

- 1 Discover the benefits.
- 2 Calculate how much you need.
- 3 Start moving in the right direction.



Have Questions?  
Call (877) 318-7712

Narration



### Reason 3: Saving early makes a REAL difference.

Because of the power of compounding investment growth, you can earn more with less if you start now!



This hypothetical illustration assumes pre-tax contributions made at the beginning of each month and an annual effective rate of return of 8% and reinvestment of earnings.

More Information

Enroll Now Continue

- 1 Discover the benefits.
- 2 Calculate how much you need.
- 3 Start moving in the right direction.



Have Questions?  
Call (877) 318-7712

Narration



### What's your planning style?

Everyone is different. Some prefer a simple, pre-diversified solution, like a target date fund; while others may prefer to create their own portfolio. The choice is yours.

#### Target Date Funds

For the person who prefers a pre-diversified solution

- 1 fund that takes the hassle out of fund selection
- It's already diversified for you – with a mix of investment types – all in one
- The mix of investments is designed by a professional investment manager.
- Built with your retirement date in mind, automatically becoming more conservative as your near retirement.

OR

#### Create Your Own Portfolio

For the person who prefers to select their own investments

- Select one or more funds of your choosing
- Responsibility for diversification of the portfolio is yours
- Research and design your own mix of investments
- You need to monitor and change your selection of funds over time

1 Disclaimer

Enroll Now

Continue

**Your Monthly Contribution**

6%

\$250  
PER MONTH

---

Annual Salary: 50K

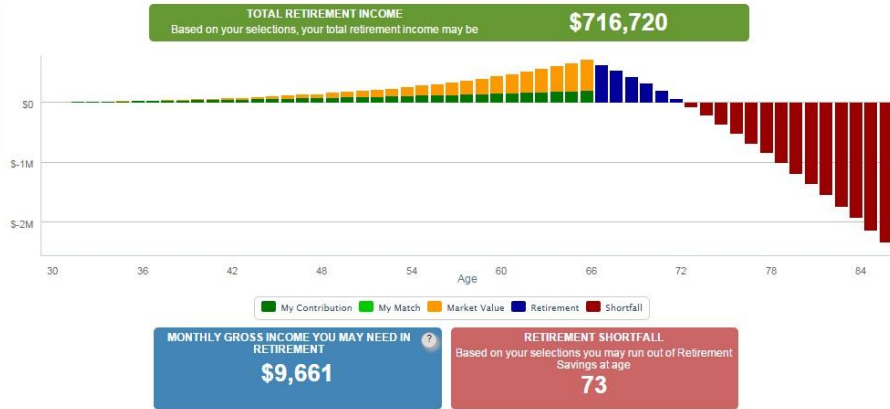
Income Replacement (%): 80%

Retirement Age: 67

Years in Retirement: 20

Monthly Social Security Income: 0

Change Other Assumptions



1 Legal Disclaimer

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## TotalSource to RUN Migration Tool

### Welcome!

Please enter your User Name



Please enter your Password



LOGIN

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## TotalSource to RUN Migration Tool

**You must complete these fields.**

### Welcome!

Please enter your User Name



Please enter your Password



LOGIN

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Migrate Dashboard

TotalSource Company Name:	Demo Test Client Easy Pay	RUN Company Name:	Demo Test RUN Client
Pay Group:	ZZ2	RUN IID:	30176217
Tax Branch:	BN		

1. Employee Mapping 2. Employee Info 3. Submit Client

Employee Mapping

Total Source		RUN
Earning Code	Earning Name	Mapping
01	Regular	Standard Earnings
02	Overtime	Paid time off
03	Overtime	Paid time off
Deduction Code	Deduction Name	Mapping

Employee Info

Total No. of Total Source Employees:	23	Total No. of RUN Employees:	20
--------------------------------------	----	-----------------------------	----

Total Source Employees	Employee Status	RUN Employees
Emp One	Active	Emp One
Emp Two	Terminated	---
Emp Three	Vacation	Emp Three
Emp Four	Active	Emp Four
Emp Five	Active	Emp Five
Emp Six	Active	Emp Six
Emp Seven	Active	Emp Seven

1 2 3 4

NEXT



Migrate Dashboard

Pay Group	User ID	RUN CC	RUN BR	RUN IID	Last updated	Last Activity	Status
<a href="#">189</a>	abc	BGN	RA	30436217	01-08-2015 09:10:11	Submit Client	Success
<a href="#">234</a>	efg			1124217	01-12-2015 01:12:33	Employee Info	Failure
<a href="#">311</a>	efg	BGN	RA	3023217	01-11-2015 02:32:21	Submit Client	In Progress
<a href="#">989</a>	xyz	BGN	RA	30176217	01-06-2015 08:12:41	Submit Client	Success
<a href="#">989</a>	yzx	BGN	RA	30176712	01-07-2015 09:12:41	Submit Client	Success

REFRESH



## First, we need to verify your identity

First Name

Last Name

Birth Date

Month  Day  Year

Social Security Number

[Register as a contractor \(1099\)](#)

CANCEL

NEXT

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## First, we need to verify your identity

Start by entering either your Social Security Number or Tax ID Number (TIN)

Social Security Number

Tax ID Number (TIN)

First Name

Company Name

Last Name

ZIP Code

[Register as an employee](#)

CANCEL

NEXT

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**Pay** Feb 26, 2011

- Gross Pay \$1,536.00
- Taxes \$256.00
- Deductions \$256.00
- Take Home \$1,280.00

[DOWNLOAD PAY STATEMENT](#)

**2 Days Until Payday**

**Timecard**

PM  
**12:17**

[PUNCH](#)

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1. Company Info 2. Bank Account 3. Pay Frequency 4. **Taxes** 5. Earnings Deductions 6. Departments

### Tax Info ?

Description	Identification Number	Deposit Frequency	
<b>FEDERAL TAX</b>			
Federal	098987-987	Monthly	<a href="#">Edit</a>
<b>STATE TAX</b>			
New Jersey	03468-9859	Monthly	<a href="#">Edit</a>
<b>LOCAL TAX</b>			
LOCAL SERVICES TAX (LST)			

[Add Federal](#)
[Add State](#)
[Add Local](#)
[Delete](#)
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