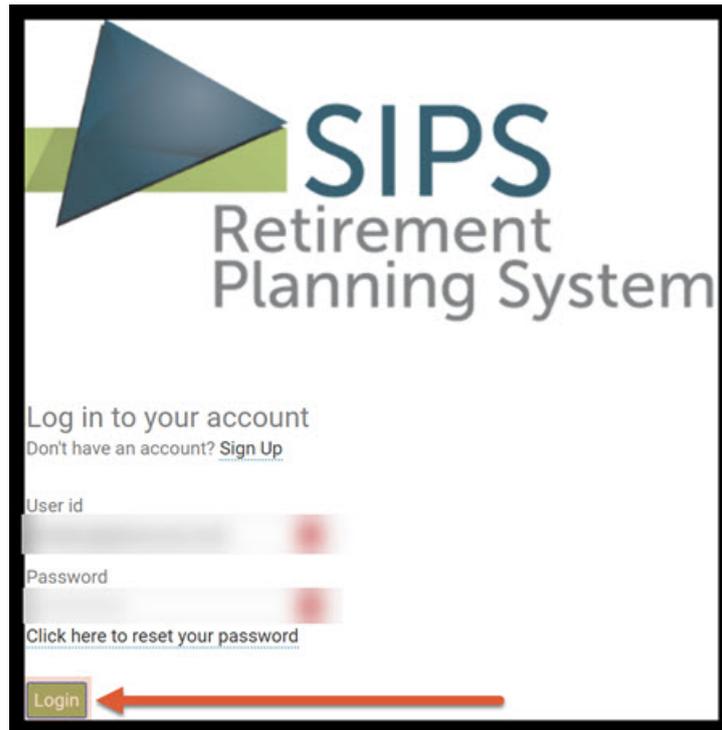


# Adding a New Case

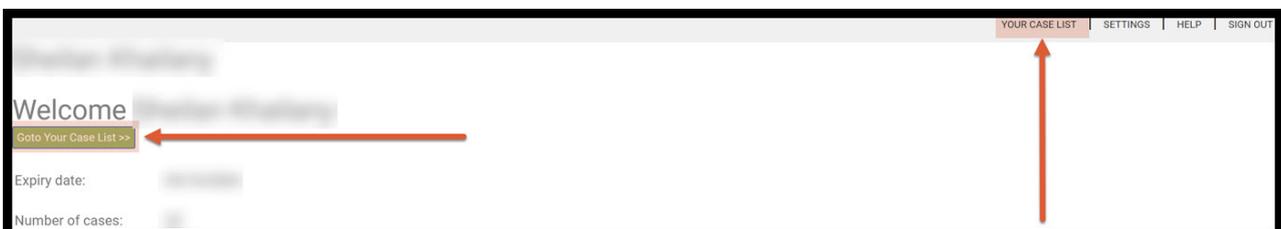
12/06/2024 4:09 pm EST

Below are the step-by-step guidelines for adding a basic new case into SIPS. Before entering a new case, ensure you have the necessary information, including the client's demographic details (name and age) and financial data (income and assets). Detailed instructions for each specific page can be found in the client dashboard section.

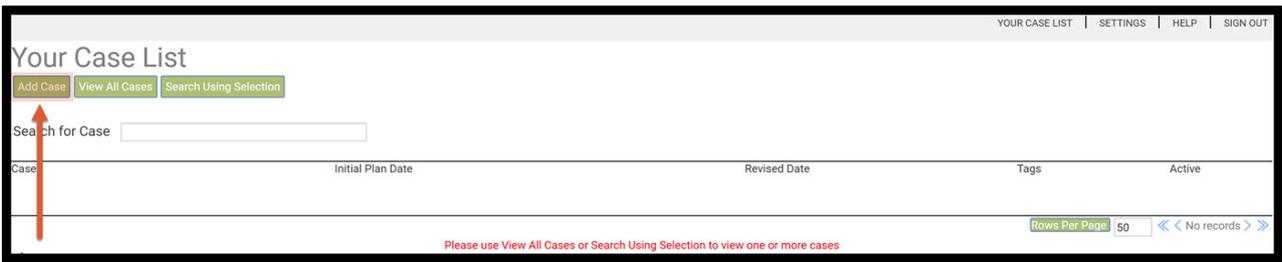
Step 1: Logging In: Log into SIPS.



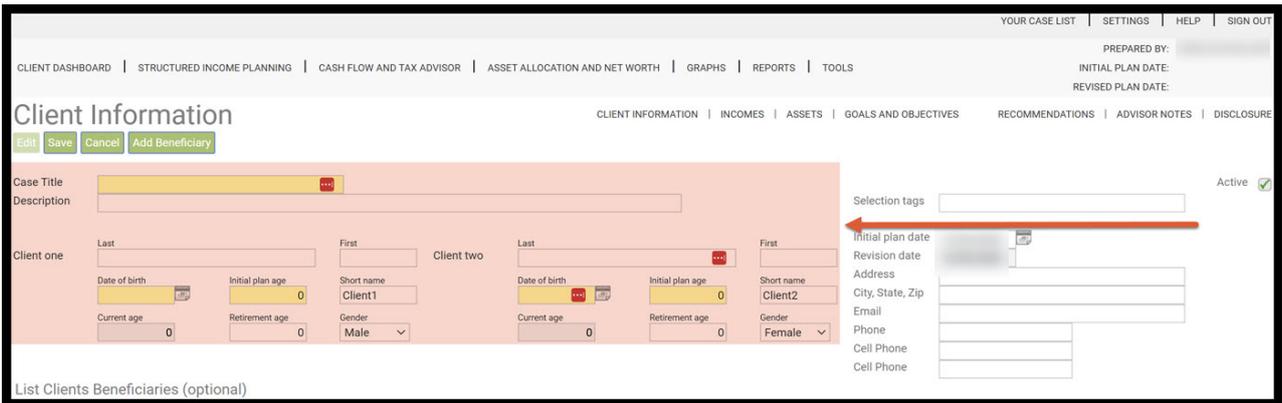
Step 2: Welcome Page: To navigate to the Your Case List screen, you have two options: click the green Go To Your Case List button under the Welcome heading, or select Your Case List in the upper-right corner. Both options lead to the same Your Case List page.



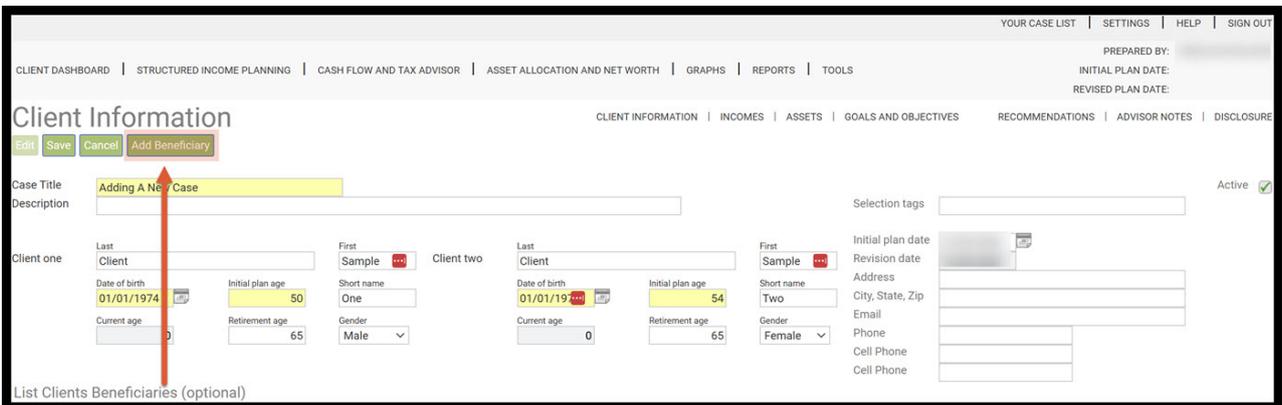
Step 3: Add Case: Click on the green Add Case button underneath the Your Case List subheading.



Step 4: Client Information Text Boxes: The yellow shaded text boxes are mandatory to fill out to move to the next step. Enter in the information for the text boxes.



Step 5: Add Beneficiary: Click on the green Add Beneficiary button underneath the Client Information subheading if the client has beneficiaries.



Step 6: List Clients Beneficiaries (optional): Enter in the name of the beneficiaries.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [blurred]  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

### Client Information

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel Add Beneficiary

Case Title: Adding A New Case

Description: [text area]

Selection tags: [text area] Active

Client one: Last: Client, First: Sample, Date of birth: 01/01/1974, Initial plan age: 50, Current age: 50, Retirement age: 65, Gender: Male

Client two: Last: Client, First: Sample, Date of birth: 01/01/1974, Initial plan age: 54, Current age: 54, Retirement age: 65, Gender: Female

Initial plan date: [calendar icon]  
Revision date: [calendar icon]  
Address: [text area]  
City, State, Zip: [text area]  
Email: [text area]  
Phone: [text area]  
Cell Phone: [text area]

List Clients Beneficiaries (optional)  
Name: [text area] unsaved

Step 7: Save: Click on the green save button underneath the Client Information subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [blurred]  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

### Client Information

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel Add Beneficiary

Case Title: Adding A New Case

Description: [text area]

Selection tags: [text area] Active

Client one: Last: Client, First: Sample, Date of birth: 01/01/1974, Initial plan age: 50, Current age: 50, Retirement age: 65, Gender: Male

Client two: Last: Client, First: Sample, Date of birth: 01/01/1974, Initial plan age: 54, Current age: 54, Retirement age: 65, Gender: Female

Initial plan date: 12/05/2024  
Revision date: 12/05/2024  
Address: [text area]  
City, State, Zip: [text area]  
Email: [text area]  
Phone: [text area]  
Cell Phone: [text area]

List Clients Beneficiaries (optional)  
Name: [text area] unsaved  
Beneficiary Name: [text area]

Step 8: Goto Incomes: Click on the green GoTo Incomes underneath the Client Information subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [blurred]  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

### Client Information

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Goto Incomes >>

Case Title: Adding A New Case

Description: [text area]

Selection tags: [text area] Active

Client one: Last: Client, First: Sample, Date of birth: 01/01/1974, Initial plan age: 50, Current age: 50, Retirement age: 65, Gender: Male

Client two: Last: Client, First: Sample, Date of birth: 01/01/1974, Initial plan age: 54, Current age: 54, Retirement age: 65, Gender: Female

Initial plan date: [calendar icon]  
Revision date: [calendar icon]  
Address: [text area]  
City, State, Zip: [text area]  
Email: [text area]  
Phone: [text area]  
Cell Phone: [text area]

List Clients Beneficiaries (optional)  
Name: [text area]  
Beneficiary Name: [text area]

Step 9: Edit: Click on the green Edit button underneath the Incomes subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

### Incomes

[Edit](#) [Goto Assets >>](#)

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	Expected wage increase while working %	0.0		Expected wage increase while working %	0.0
Social security	At age	Yearly amount	Social security	At age	Yearly amount
	62			62	
	Projected benefits			Projected benefits	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0
Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
	0			0	
	Projected benefits			Projected benefits	
	OR Current benefit if already retired			OR Current benefit if already retired	
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 10: Amounts Radio Buttons: Select which amounts you will be using, the default is set at yearly amounts.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

### Incomes

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	Expected wage increase while working %	0.0		Expected wage increase while working %	0.0
Social security	At age	Yearly amount	Social security	At age	Yearly amount
	62			62	
	Projected benefits			Projected benefits	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0
Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
	0			0	
	Projected benefits			Projected benefits	
	OR Current benefit if already retired			OR Current benefit if already retired	
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 11: Wages/Income: If your client is employed, enter their wage/income information. SIPS accepts commas and dollar symbols. The yellow-shaded text boxes are mandatory and must be completed to proceed to the next step. If your client is not employed, skip to the Social Security section.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

### Incomes

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	Expected wage increase while working %	0.0		Expected wage increase while working %	0.0
Social security	At age	Yearly amount	Social security	At age	Yearly amount
	62			62	
	Projected benefits			Projected benefits	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0
Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
	0			0	
	Projected benefits			Projected benefits	
	OR Current benefit if already retired			OR Current benefit if already retired	
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 12: Social Security: For projected benefits, you can enter in one amount per age. If the client is already retired, input their benefit amounts. The yellow-shaded text boxes are mandatory and must be completed to proceed to the next step.

**Adding A New Case**

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

**Incomes**

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Enter monthly amounts  Enter yearly amounts

<b>Wages/Income</b>	Current income (if still working)	Yearly amount	<b>Wages/Income</b>	Current income (if still working)	Yearly amount
	\$100,000				0
	Expected wage increase while working %	2.0		Expected wage increase while working %	0

<b>Social security</b>	At age	Yearly amount	<b>Social security</b>	At age	Yearly amount	
Projected benefits	62		Projected benefits	62		
	67			Projected benefits	67	
	70				70	
Or			Or			
OR Current benefit if already retired			OR Current benefit if already retired			
Expected COLA increase %			Expected COLA increase %			

<b>Pensions</b>	Projected benefits	At age	Yearly amount	<b>Pensions</b>	Projected benefits	At age	Yearly amount
		65	\$48,000			0	
Or				Or			
OR Current benefit if already retired				OR Current benefit if already retired			
Expected COLA increase %			1.5	Expected COLA increase %			0.0

Step 13: Pensions: If your client will receive a pension, enter the relevant information. The yellow-shaded text boxes are mandatory and must be completed to proceed to the next step.

**Adding A New Case**

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

**Incomes**

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Enter monthly amounts  Enter yearly amounts

<b>Wages/Income</b>	Current income (if still working)	Yearly amount	<b>Wages/Income</b>	Current income (if still working)	Yearly amount
	\$100,000				0
	Expected wage increase while working %	2.0		Expected wage increase while working %	0

<b>Social security</b>	At age	Yearly amount	<b>Social security</b>	At age	Yearly amount	
Projected benefits	62		Projected benefits	62		
	67			Projected benefits	67	
	70	36,000			70	20,000
Or			Or			
OR Current benefit if already retired			OR Current benefit if already retired			
Expected COLA increase %			Expected COLA increase %		2.5	

<b>Pensions</b>	Projected benefits	At age	Yearly amount	<b>Pensions</b>	Projected benefits	At age	Yearly amount
		65				0	
Or				Or			
OR Current benefit if already retired				OR Current benefit if already retired			
Expected COLA increase %				Expected COLA increase %			0.0

Step 14: Save: Click on the green Save button underneath the Incomes subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Incomes

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	100,000			\$60,000	
Expected wage increase while working %	2.0		Expected wage increase while working %	2.5	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	62	
	67			67	
	70	36,000		70	
OR Current benefit if already retired			OR Current benefit if already retired		20,000
Expected COLA increase %		2.5	Expected COLA increase %		2.5

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	48,000	Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		1.5	Expected COLA increase %		0.0

Step 15: Goto Assets: Click on the green GoTo Assets button underneath the Incomes subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Incomes

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

[Edit](#) [GoTo Assets >>](#)

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	\$100,000				
Expected wage increase while working %	2.0		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	\$20,323	Projected benefits	62	\$11,290
	67	\$29,032		67	\$16,129
	70	\$36,000		70	\$20,000
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		2.5	Expected COLA increase %		2.5

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	\$48,000	Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		1.5	Expected COLA increase %		0.0

Step 16: Edit: Click on the green Edit button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

[Edit](#) [Create Planning Scenario](#)

- Current Monetary Assets
- Property List (homes, rentals, land)
- Other Assets & Liabilities (boats, RV, collectibles)

Orange backgrounds indicate hypothetical returns

Step 17: Add Monetary Assets: Click on the green Add monetary Assets button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel **Add Monetary Asset** Add Property Add Other Asset

Current Monetary Assets

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 18: Current Monetary Assets: Enter in the data.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel **Add Monetary Asset** Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
	One	NQ	n/a	none	0.0	unsaved

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 19: Add Monetary Asset: Repeat step 18 if your client has more than one monetary asset.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel **Add Monetary Asset** Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings account	joint	NQ	Cons	Conservative	0.001	25,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 20: Save: Click on the green Save button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit **Save** Cancel **Add Monetary Asset** Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings account	joint	NQ	Cons	Conservative	0.001	\$25,000
Roth IR	One	ROTH	Mod	Moderate	3.0	\$500,000
401(k)	Two	401K	Aggr	Aggressive	6	750,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 21: Create Planning Scenario: Click on the green Create Planning Scenario button underneath the Assets subheading.

The screenshot shows the 'Adding A New Case' interface. At the top right, there are links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this, there are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The 'Assets' section is highlighted, and a red arrow points to the 'Create Planning Scenario' button. Below this, there are sections for 'Current Monetary Assets' (with a table of assets like Checking/Savings account, Roth IRA, and 401(k)), 'Property List (homes, rentals, land)', and 'Other Assets & Liabilities (boats, RV, collectibles)'. A note at the bottom states 'Orange backgrounds indicate hypothetical returns'.

Step 22: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

The screenshot shows the 'Adding A New Case' interface for 'Structured Income Planning'. At the top right, there are links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this, there are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The 'Structured Income Planning' section is highlighted, and a red arrow points to the 'Dynamic Mode' button. Below this, there is a 'Scenario' dropdown menu set to 'New Scenario (1)'. The main area is a table showing 'Planning Horizon' (16 years) and a detailed financial projection. The table has columns for 'Year', 'One', 'Two', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'One Wages (3)', 'One SS (3)', 'Two SS (3)', 'One Pension (3)', 'Total Income', and 'Year'. The data shows a 16-year projection starting from year 50, with various income sources and total income values. A note at the bottom states 'Orange backgrounds indicate hypothetical returns'.

Step 23: Log Out: To log out of SIPS click on the Sign Out heading that is located in the upper righthand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Adding A New Case

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY:   
INITIAL PLAN DATE:   
REVISED PLAN DATE:

### Structured Income Planning

Edit Dynamic Mode

Scenario New Scenario (1)

Planning Horizon 16 years

Year	Checking/Savings account (2)		Roth IRA (2)		401 (2)		Accounts Total	Planned Distribution	One Wages (3)	One SS (3)	Two SS (3)	One Pension (3)	Total Income	Year		
	Account	Income	Account	Income	Account	Income										
net return	50	54	0.00 %		3.00 %		6.00 %	Two IRA								
initial amount			25,000		500,000		750,000									
bonus %			0.00 %		0.00 %		0.00 %									
w/bonus			25,000		500,000		750,000									
end of 1	51	55	25,000	0	515,000	0	795,000	0	1,335,000	0	100,000	0	100,000	end of 1		
end of 2	52	56	25,000	0	530,450	0	842,700	0	1,398,150	0	102,000	0	102,000	end of 2		
end of 3	53	57	25,001	0	546,364	0	893,262	0	1,464,626	0	104,040	0	104,040	end of 3		
end of 4	54	58	25,001	0	562,754	0	946,858	0	1,534,613	0	106,121	0	106,121	end of 4		
end of 5	55	59	25,001	0	579,637	0	1,003,669	0	1,608,307	0	108,243	0	108,243	end of 5		
end of 6	56	60	25,002	0	597,026	0	1,063,889	0	1,685,916	0	110,408	0	110,408	end of 6		
end of 7	57	61	25,002	0	614,937	0	1,127,722	0	1,767,661	0	112,616	0	112,616	end of 7		
end of 8	58	62	25,002	0	633,385	0	1,195,386	0	1,853,772	0	114,869	0	114,869	end of 8		
end of 9	59	63	25,002	0	652,386	0	1,267,108	0	1,944,497	0	117,166	0	117,166	end of 9		
end of 10	60	64	25,002	0	671,958	0	1,343,135	0	2,040,095	0	119,509	0	119,509	end of 10		
end of 11	61	65	25,003	0	692,117	0	1,423,723	0	2,140,842	0	121,899	0	136,953	end of 11		
end of 12	62	66	25,003	0	712,880	0	1,509,146	0	2,247,029	0	124,337	0	139,768	end of 12		
end of 13	63	67	25,003	0	734,267	0	1,599,695	0	2,358,964	0	126,824	0	142,640	end of 13		
end of 14	64	68	25,004	0	756,295	0	1,695,676	0	2,476,974	0	129,361	0	145,572	end of 14		
end of 15	65	69	25,004	0	778,983	0	1,797,417	0	2,601,404	0	0	27,097	16,617	48,000	91,714	end of 15
end of 16	66	70	25,004	0	802,353	0	1,905,262	0	2,732,618	0	0	27,774	17,032	48,720	93,527	end of 16
									0	1,597,394	54,871	96,161	96,720	1,845,146		

Orange backgrounds indicate hypothetical returns

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or [support@planscout.com](mailto:support@planscout.com).