## Understanding a Basic Structured Income Plan

12/11/2024 3:51 pm EST

After inputting all the client information into SIPS, the system will create a basic planning scenario. Below is an explanation of what each column represents in a basic planning scenario.

Step 1: Scenario: This text box shows the scenario you are currently viewing. To switch scenarios, click the dropdown arrow and select a different one.



Step 2: Planning Horizon: This text box displays the timeline for the planning scenario. To adjust the timeline, click the dropdown arrow and select a timeframe.

												YOUR CASE LIST SETTINGS	HELP
												PREPARED BY:	
												INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCAT	ION AND NET	WORTH 0	RAPHS R	EPORTS -	DLS REVISED PLAN DATE:	
Struct	Ired I	ncom	o Plar	nnina									
onucn	urcur	ncom	C I Iui	inning									
Edit Dynamic	o Mode												
Scenario Dea	ding A Deale	Chrysel used lase	erre Dien										
Rea	ding A Basic	structured inc	ome Plan				~						
			22		"K	1							
			Acco	unts	~								
Planning	20 years 🗸	Checkin	gs/Savings	Individu	al Roth IRA			Inco	mes 7 <sup>K</sup>				
HOHZOH	-	Ac	count	marriad	arnournos	A	Dispared		г —	Tetal	-		
Year	T	Account	Income	Account	Income	Total	Distribution	Wages	SS	Income	Year		
net return	50	0.00 %	6 - C.	3.00 %		150.000	Output						
bonus %		0.00 %		0.00 %		150,000	of account	Infl Factor	Infl Factor				
w/bonus		50,000		100,000		150,000	incomes	2.50 %	2.50 %				
end of 1	51	50,000	0	103,000	0	153,000	0	100,000	0	100,000	end of 1		
end of 2	52	50,001	0	106,090	0	156,091	0	102,500	0	102,500	end of 2		
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3		
end of 5	55	50,002	0	115,927	0	165,930	0	110 381	0	110 381	end of 5		
end of 6	56	50.003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6		
end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7		
end of 8	58	50,004	0	126,677	0	176,681	0	118,869	0	118,869	end of 8		
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9		
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10		
end of 11	62	50,006	0	138,423	0	168,429	0	128,008	0	128,008	end of 11		
end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13		
end of 14	64	50,007	0	151,259	0	201,266	0	137,851	0	137,851	end of 14		
end of 15	65	50,008	0	155,797	0	205,804	0	0	33,600	33,600	end of 15		
end of 16	66	50,008	0	160,471	0	210,479	0	0	34,440	34,440	end of 16		
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17		
end of 18	68	50,009	0	170,243	0	220,252	0	0	36,184	36,184	end of 18		
end of 20	70	50,010	0	180 611	0	225,560	0	0	38,015	38,015	end of 20		
5.13 51 20		50,010	0	100,011	0	200,021	0	1,651,895	214,628	1,866,523	0110 01 20		
Orange ba	ickarounds in	dicate hypoth	etical returns	5									

Step 3: Year: The leftmost and rightmost columns represent the years within the timeframe. The final row indicates the last year of the planning horizon.

Clear Added Addition         Clear Addition         C														YOUR CASE LIST	SETTINGS
Client Address       STRUCTURED INCOME PLANING       CASH FLOW AND TXX ADVISOR       ASSET ALLOCATION AND NET WORTH       ORAPH       REPORT       TOLLS       Intitle PLAN DATE         Structured Income Planning       Interview Plan															PREPARED BY:
CLIRIT         ANSHEDARD         STRUCTURED INCOME PLANNING         CASH FLOW AND TXX ADVISOR         ASSET ALLOCATION AND NET WORTH         GRAPH         REPORT         TOLIS           CLIRIT         ACCOUNTS           Inclusion           Concents           Income         Accounts           Income         Accounts           Income         Accounts           Income         Account           Income         Accounts           Income         Accounts           Income         Accounts           Income         Year           Account         Income         Accounts         Income         Year           Account         Income         Account         Income         Year           Account         Income         Account         Income         Year           Account         Income         Account         Income         Year           Account         Income         Year         Informe         Account         Informe         Account         Informe         Informe         Account         Informe         Informe														1	NITIAL PLAN DATE:
Star         Ictured Income Planning           yumic Mdds           sear         reading A Basic Structured Income Plan	LIENT	DARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	WORTH   G	RAPHS R	EPORT 1	DLS	RE	VISED PLAN DATE:
Vear         Accounts         Income         Second         Vear           20 years         Checkings/Swings         Individual Roth IRA         Income         Income         Vear           1 anito         20 years         Checkings/Swings         Individual Roth IRA         Income         Vear           1 anito         20 years         Checkings/Swings         Individual Roth IRA         Income         Vear           1 anito         20 years         Checkings/Swings         Individual Roth IRA         Vear         Vear         Vear           1 anito         0.00 %         300 %         Indoxo         Vear         Vear         Vear           1 anito         0.00 %         0.00 %         150.000         Subtota         Inf Factor         Inf Factor         Inf Factor           end of 1 51         50.000         0         153.000         0         100.000         100.000         100.000         100.000         0         100.000         0         100.000         100.000         100.000         100.000         0         100.000         0         100.000         0         100.000         0         100.000         0         100.000         0         100.000         0         100.000         0         100.00	Struct	urod Ir	acom		ning										
Reading A Basic Structured Income Plan           20 years         Checkings/Savings Account         Individual Roth IRA           reate tun         Account         Individual Roth IRA           reate tun         Souto         Souto         Total         Distribution         Wages         SS         Total         Vear           end of 1         50,000         100,000         150,000         Subtotation         Inf Factor         Inf Souto         Indox         Indox         Indox         Inf Factor         Inf Factor <td></td> <td>ureu ii</td> <td>ICOIII</td> <td>eriai</td> <td>innig</td> <td></td>		ureu ii	ICOIII	eriai	innig										
Verain         Accounts         Income         Total           Verain         Checkings/Swing         Individual Foh IRA         Income         Income           Verain         Checkings/Swing         Individual Foh IRA         Verain         Verain           Verain         Checkings/Swing         Individual Foh IRA         Verain         Verain           Verain         Checkings/Swing         Income         Account         Income         Verain           Verain         Souns         Souns         Income         Souns         Verain         Verain           Verain         Souns         Souns         Income         Account         Income         Verain           Verain         Souns         Souns         Income         Account         Income         Verain           Verain         Souns         Souns         Infractor         Infractor         Infractor           verain         Souns         Infractor         Infractor         Infractor         Infractor           verain         Souns         Infractor         Infractor         Infractor         Infractor           verain         Souns         Infractor         Infractor         Infractor         Infractor           verain	dit ynami	c Mode													
Scenaro         Reading A Basic Structured Income Plan         Accounts         Income           1amiliza         20 years         Checking y Swrings         Individual Roth IRA         Income         S           Year         Account         Income         Account         Income         S         S           Wear         Account         Income         Account         Income         Year         Year           No         0.00         100,00         100,000         Subthalia         Year         Year         Year         Year         Account         Income         Year															
Veraining         Veraining         Accounts         Income         S         Total         Veraining           Particity         20 years         Checkings/Savings         Individual Roth IRA         Income         Account         Income         Account         Income         Account         Income         Veraining         S         Income         Veraining         Veraining         Southead         Inf Factor         Inf Factor         Veraining         Veraining         Veraining         Southead         Inf Factor															
Account         Individual Roth IRA           Ver         Account         Income         Account         Infance         State         Infance         Infanco	Rea	ading A Basic S	structured Inc	ome Plan				~							
Image: Second		i i				_×	ì								
Jannia         20 years         Checkings/Savings Account         Individue Roth IRA         Income         Account         Income         Statisticat         Income         Year           Initial amount         50,000         0.00 %         3.00 %         150,000         Subtolal         Inf Factor         <				Acco	ounts	~						- 1			
Vert         Account         Income         Account         Income         Account         Income         Account         Income         Account         Income         Account         Income         Ver           net return borus%         50         0.00         50,000         100,000         150,000         Infl Factor         Infl Fac	lannin	20 years 🗸	Checkin	gs/Savings	Individu	al Roth IRA	1		Inco	mes 📈		+			
Year         Account         Income         Account         Income         Account         Income         Account         Income         Account         Income         Account         Wages         SS         Income         Year           met return         50         0.00 %         0.00 %         100,000         100,000         0         Income	011201		Ac	count			Accounts	Diagnord			Total	-			
net return Initial amounts         50         0.00         3.00         50,000         100,000         0         Subtrait of account         Inf Factor           w/bonus         50,000         0.00         100,000         100,000         0         160,000         100,000         100,000         100,000         100,000         100,000         100,000         100,000         100,000         100,000         100,000         end of 1           end of 1         51         50,000         0         133,000         0         156,091         0         100,000         end of 1           end of 2         52         50,001         0         106,090         0         156,091         0         102,500         end of 3           end of 4         54         50,002         0         112,251         0         165,930         0         110,381         0         110,381         end of 5           end of 6         556         50,003         0         119,405         0         156,940         0         113,141         end of 6         end of 7           end of 7         57         50,004         0         126,877         0         176,881         0         121,840         0         121,840 <t< td=""><td>Year</td><td></td><td>Account</td><td>Income</td><td>Account</td><td>Income</td><td>Total</td><td>Distribution</td><td>Wages</td><td>SS</td><td>Income</td><td>Year</td><td></td><td></td><td></td></t<>	Year		Account	Income	Account	Income	Total	Distribution	Wages	SS	Income	Year			
Initial amount bonus %         0.00 %         100,000         110,000         110,000         110,000         110,000         110,000         110,000         110,000         111,000         110,000 </td <td>net return</td> <td>50</td> <td>0.00 %</td> <td></td> <td>3.00 %</td> <td></td> <td>450.000</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	net return	50	0.00 %		3.00 %		450.000								
w/bonus         50,000         100,000         150,000         incomes         2.50 %         2.50 %         100,000         end of 1           end of 1         51         50,000         0         103,000         0         150,000         0         100,000         end of 2           end of 3         53         50,002         0         109,273         0         155,291         0         105,062         0         100,260         end of 4           end of 4         54         50,002         0         115,251         0         162,553         0         107,689         end of 4           end of 5         55         50,002         0         115,297         0         165,930         0         1110,381         end of 6           end of 5         55         50,002         0         112,287         0         165,930         0         1113,341         end of 6           end of 5         55         50,004         0         122,987         0         172,991         0         115,969         end of 7           end of 8         58         50,004         0         124,840         0         121,840         0         121,840         0         121,840         end of	honus %		50,000		0.00 %		150,000	of account	Infl Factor	Infl Factor					
end of 1       51       50,000       0       103,000       0       158,000       0       100,000       end of 1         end of 2       52       50,001       0       106,000       0       102,500       0       102,500       end of 2         end of 3       53       50,002       0       112,551       0       162,553       0       105,662       0       107,689       end of 4         end of 5       55       50,002       0       115,227       0       162,553       0       107,689       0       107,689       end of 5         end of 6       56       50,002       0       115,227       0       162,953       0       110,381       0       113,141       end of 6         end of 6       56       50,004       0       122,847       0       115,869       0       113,841       end of 7         end of 8       58       50,004       0       124,847       0       121,840       0       121,840       0       121,840       0       121,840       0       121,840       0       132,491       0       132,492       0       132,492       0       132,493       0       132,480       0       132,480	w/bonus		50,000		100,000		150,000	incomes	2.50 %	2.50 %					
end of 2       52       50,001       0       106,090       0       159,274       0       102,500       end of 3         end of 4       54       50,002       0       109,273       0       159,274       0       105,662       end of 3         end of 5       55       50,002       0       112,551       0       165,583       0       107,689       end of 5         end of 6       56       50,002       0       119,405       0       113,141       end of 6         end of 7       57       50,004       0       122,870       115,969       end of 7         end of 8       58       50,004       0       126,877       0       115,869       end of 7         end of 10       60       50,005       0       134,497       0       121,840       end of 10         end of 11       61       50,006       134,392       0       184,397       0       122,808       0       122,800       end of 11         end of 13       62       50,006       134,322       0       184,429       0       128,008       end of 12         end of 13       63       50,006       144,575       0       128,008       end of 13	end of 1	51	50,000	0	103,000	0	153,000	0	100,000	0	100,000	end of 1			
and of 4       Source	end of 2	52	50,001	0	106,090	0	156,091	0	102,500	0	102,500	end of 2 end of 3			
end of 5       55       50,002       0       115,927       0       169,300       0       110,381       end of 5         end of 6       56       50,003       0       119,405       0       169,400       0       110,381       0       110,314       end of 5         end of 7       57       50,004       0       122,867       0       172,991       0       115,969       end of 7         end of 8       58       50,004       0       122,867       0       172,991       0       113,849       0       118,869       end of 7         end of 9       59       50,004       0       134,392       0       182,869       0       121,840       0       121,840       0       121,840         end of 10       60       50,006       0       134,392       0       182,829       0       124,886       end of 10         end of 12       62       50,006       0       142,876       0       132,099       0       132,499       end of 12         end of 13       63       50,006       0       142,876       0       132,499       0       132,489       end of 13         end of 14       64       50,007	end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4			
end of 5       50       50,003       0       119,405       0       169,408       0       113,141       ond of 6         end of 7       57       50,004       0       122,877       0       172,991       0       113,141       ond of 7         end of 8       58       50,004       0       122,877       0       172,991       0       113,849       0       113,849       end of 7         end of 9       59       50,004       0       126,677       0       176,681       0       118,869       end of 8       end of 9         end of 10       60       50,005       0       134,392       0       188,429       0       128,800       0       128,800       end of 10         end of 11       61       50,006       0       138,423       0       188,429       0       128,008       end of 12       end of 12         end of 13       63       50,006       0       144,853       0       192,862       0       132,449       0       128,489       end of 13         end of 15       65       50,008       0       165,797       0       208,284       0       0       33,409       end of 13         end of	end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5			
end of 7       57       50,004       0       122,997       0       172,991       0       115,969       end of 7         end of 8       58       50,004       0       122,977       0       175,681       0       115,969       0       115,869       end of 8         end of 9       59       50,004       0       120,477       0       184,892       0       121,840       0       121,840       end of 10         end of 11       61       50,005       0       134,392       0       184,397       0       124,886       0       121,840       end of 10         end of 12       62       50,006       0       134,392       0       184,397       0       124,886       0       124,886       end of 11         end of 12       62       50,006       0       143,457       0       132,029       0       131,209       end of 13         end of 14       64       50,007       0       151,259       0       202,564       0       132,459       0       137,451       end of 14         end of 15       65       50,008       0       165,277       0       205,504       0       33,600       end of 14       64	end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6			
and of 9       59       50,004       0       120,477       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       110,409       0       112,440       0       0       124,886       0       124,886       0       124,886       0       124,886       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       124,806       0       132,008       end of 11       0       126,821       0       131,209       0       131,409       end of 12       63       50,006       0       134,439       0       134,489       end of 13       64       50,007       0       155,797       0       201,266       0       137,851       end of 15       end of 15       end of 16	end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7			
end of 10         60         50,005         0         134,392         0         184,397         0         124,886         0         124,886         end of 10           end of 11         61         50,005         0         138,423         0         184,497         0         124,886         end of 10           end of 11         61         50,006         0         138,423         0         184,497         0         128,008         end of 11           62         50,006         0         142,576         0         192,582         0         131,209         end of 12           end of 13         63         50,006         0         146,853         0         198,660         0         134,489         end of 13           end of 15         65         50,008         0         155,797         0         208,584         0         0         33,500         end of 15           end of 15         66         50,008         0         165,285         0         212,479         0         0         34,440         end of 17           end of 17         67         50,008         0         165,285         0         212,479         0         0         36,104         36,184	end of 9	59	50,004	0	130,477		180,482	0	121,840	0	121.840	end of 9			
end of 11         61         50,006         0         138,423         0         188,429         0         128,008         end of 11           end of 12         62         50,006         0         142,576         0         192,582         0         131,209         end of 13           end of 12         63         50,006         0         144,575         0         192,582         0         131,209         end of 13           end of 14         64         50,007         0         151,259         0         201,266         0         137,481         end of 14           end of 16         65         50,008         0         155,797         0         205,804         0         0         33,600         end of 15           end of 16         66         50,008         0         165,797         0         201,266         0         33,400         end of 16           end of 17         67         50,008         0         165,285         0         212,479         0         0         34,440         34,440         end of 17           end of 17         67         50,008         0         155,285         0         212,293         0         0         35,301	end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10			
end of 12     62     50,006     0     142,576     0     192,822     0     131,209     0     131,209     end of 12       end of 13     63     50,006     0     144,853     0     133,489     0     134,489     end of 13       end of 14     64     50,007     0     151,259     0     201,266     0     137,851     end of 13       end of 15     65     50,008     0     155,797     0     208,640     0     0     33,600     end of 15       end of 16     66     50,008     0     155,797     0     208,640     0     0     33,600     end of 15       end of 17     67     50,008     0     165,285     0     212,232     0     0     34,440     end of 16       end of 17     67     50,009     0     175,351     0     220,252     0     0     35,301     ed of 17       end of 19     69     50,010     0     175,351     0     220,252     0     0     38,015     end of 18       end of 19     69     50,010     0     176,351     0     220,522     0     0     38,015     end of 18       end of 19     69     50,010     0	end of 11	61	50,006	0	138,423	0	188,429	0	128,008	0	128,008	end of 11			
end of 13     63     50,006     0     146,853     0     196,860     0     134,489     0     134,489     end of 13       end of 14     64     50,007     0     151,259     0     201,266     0     137,851     end of 14       end of 15     65     50,008     0     155,797     0     208,864     0     0     33,600     end of 15       end of 16     66     50,008     0     165,297     0     208,864     0     0     34,440     end of 16       end of 17     67     50,008     0     165,285     0     216,279     0     0     35,301     end of 17       end of 18     68     50,009     0     165,285     0     220,252     0     0     36,184     end of 18       end of 19     69     50,010     0     175,351     0     220,252     0     0     38,015     end of 19       end of 19     69     50,010     0     175,351     0     220,252     0     0     38,015     end of 19       end of 20     70.08     37,088     87,088     end of 19     end of 20     0     38,015     end of 20	end of 12	62	50,006	0	142,576	0	192,582	0	131,209	0	131,209	end of 12			
end of 15         65         50,008         0         151,259         0         201,256         0         137,851         0         137,851         end of 14           end of 15         65         50,008         0         155,777         0         208,804         0         0         33,600         end of 15           end of 16         66         50,008         0         160,471         0         210,479         0         0         34,400         84,400         end of 16           end of 16         66         50,008         0         165,285         0         215,293         0         0         35,301         end of 17           end of 18         68         50,009         0         175,281         0         220,252         0         0         36,184         end of 18           end of 19         69         50,010         0         175,351         0         220,252         0         0         38,0105         end of 18           end of 19         69         50,010         0         175,351         0         223,520         0         0         38,015         end of 19           end of 20         50,010         0         180,611         0	end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13			
Cond of 16         Geo         Gourds         Cond (11)         Geo         Cond (11)         Cond (11) <td>end of 14</td> <td>65</td> <td>50,007</td> <td>0</td> <td>151,259</td> <td>0</td> <td>201,266</td> <td>0</td> <td>137,851</td> <td>33,600</td> <td>137,851</td> <td>end of 14</td> <td></td> <td></td> <td></td>	end of 14	65	50,007	0	151,259	0	201,266	0	137,851	33,600	137,851	end of 14			
and of 17         67         50,008         0         160,717         0         0         35,301         end of 17           end of 18         68         50,009         0         170,243         0         215,293         0         0         35,301         end of 17           end of 19         69         50,010         0         175,351         0         220,252         0         0         37,088         and of 18           end of 20         70         50,010         0         175,351         0         225,360         0         0         37,088         and of 18           end of 20         0         0         180,611         0         230,621         0         0         38,015         end of 20           0         0         0         0         1,651,895         214,628         1,866,523	end of 16	66	50,008	0	160.471	0	210,604	0	0	34,440	34,440	end of 16			
end of 18         68         50,009         0         170,243         0         220,252         0         0         36,184         36,184         end of 18           end of 19         69         50,010         0         175,351         0         225,360         0         0         37,088         end of 18         end of 19           end of 20         70         0         180,611         0         230,621         0         0         38,015         end of 20           0         0         1,651,895         214,628         1,866,523          end of 20          66,523	end of 17	67	50,008	0	165,285	ő	215,293	0	0	35,301	35,301	end of 17			
end of 19         69         50,010         0         175,351         0         225,360         0         0         37,088         end of 19           end of 20         70         50,010         0         180,611         0         230,621         0         0         38,015         end of 20           0         0         0         1,651,895         214,628         1,866,523         end of 20	end of 18	68	50,009	0	170,243	0	220,252	0	0	36,184	36,184	end of 18			
end of 20         70         50,010         0         180,611         0         230,621         0         0         38,015         s8,015         end of 20           0         0         0         1,651,895         214,628         1,866,523         1	end of 19	69	50,010	0	175,351	0	225,360	0	0	37,088	37,088	end of 19			
0 0 0 1,651,895 214,628 1,866,523	end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20			
		10 (100 million		0		0		0	1,651,895	214,628	1,866,523				

Step 4: Name and Age: This column displays the client's name and age. The starting age represents the client's current age, while the final row reflects the client's age at the end of the planning horizon.

Prestate Dr.         Control													YOUR CASE LIST SETTINGS H	ELP
BUILD DATE DATE DATE DATE DATE DATE DATE DAT													PREPARED BY:	
													INITIAL PLAN DATE:	
Accounts       Income         Young       Accounts         Accounts       Income         Account	CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET	WORTH   G	GRAPHS R	EPORTS   1	DOLS REVISED PLAN DATE:	
Breaking A basic Structured Income Plan         Interior Reading A basic Structured Income Plan         Income Income Plan         Vision 20 years       Checkings/Swring       Individual Roth IRA         Note: Structured Income Plan         Vision 20 years       Checkings/Swring       Individual Roth IRA         Vision 20 years       Checkings/Swring       Individual Roth IRA         Vision 20 years       Checkings/Swring       Individual Roth IRA         Vision 20 years       Checking Vision 20 years       Statistic Inf Factor         Vision 20 years       Checking Vision 20 years       Statistic Inf Factor         Vision 20 years       Checking Vision 20 years       Statistic Inf Factor         Vision 20 years       Checking Vision 20 years       Statistic Inf Factor         Vision 20 years       Checking Vision 20 years       Statistic Inf Factor         Vision 20 years       Checking Vision 20 years       Statistic Inf Factor         Vision 20 years       Checking Vision 20 years       Stat	Structu	ired li	ncom	e Plar	nina									
Private Model         nario       Reading A basic Structured Income Plan          ining       20 ye 1 ×       Checkings/Savings       Individual Roth IRA         vitage       x       x       Individual Roth IRA         veration       Account       Income       Account         ial amount       0       0.000 %       15000       Subtal         ontons %       0.000 %       100000       15000       0       102000         vital amount       50       0.000 %       100000       100000       102000         vital amount       50,000 0       1150000       102000       102000       102000         vital amount       50,000 0       1150000       102000       102000       102000       102000         vitanus       50,000 0       115000       100200       102000       102000       102000         vitanus       51       50,000 0       115000       100200       102000       102000       102000       102000         vitanus       53       50,000 0       115000       100200       102500 0       102200       102500 end of 3         end of 1       54       50,000 0       112257 0       159,25 0       1135460 0	onucit		100111	c i iui	ming									
Initial       Accounts         ring       20 year       Chechngy/Sampa       Indvidual Roth IRA         Verter       Account       Indvidual Roth IRA       Income         verter       Account       Income       Account         verter       Account       Income       Account         100 00 %       00 %       O 0 %       Status         101 00 00 %       0 00 %       O 0 caccunt       Income         verter       Status       Status       Status       Status         00 %       0 00 %       O 0 caccunt       Income       Vers         work       00 %       0 100,000       O 100,000       Income       Vers         work       00 %       0 100,000       O 100,000       Income       Vers         work       00 %       0 100,000       O 100,000       Income       Vers         work       00 %       0 100,000       Insome       Notacine       Vers         work       00 %       0 100,000       Insome       Notacine       Vers         work       00 %       0 100,000       Insome       Notacine       Vers         work       0 100,000       150,001       0 102,500       0 100,5	Edit Dynamic	Mode												
Initial mount       Accounts         Accounts       Individual Roth IRA         Vert       Accounts         Accounts       Statulation         Visions       Statulation <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>														
Account         Account       Individual Roth IRA         Individual Roth IRA         Vear       Account       Individual Roth IRA         Vear       Account       Individual Roth IRA         Vear       Account       Individual Roth IRA         Sast Checkings Swing Account       Individual Roth IRA         Subort State														
Accounts         Accounts           Year         Checkings/Swings Account         Individual Roth IRA           Year         Account         Income         Accounts         Planned Distribution         wages         SS         Total         Year           100         0.00 %         3.00 %         100,000         150,000         Subtotal Original         Nages         SS         Income         Year           net reture         50,000         0.00 %         3.00 %         0.00	Scenario Read	ding A Basic S	Structured Inc	ome Plan				~						
Ining Izon         Accounts         Individual Roth IRA           Year         Account         Individual Roth IRA           Vear         Account         Income         Account           100         S0.00         Income         Account           100         0.00         100.000         150.000         Subtrail           11al amount         50.000         100.000         150.000         of account           100.000         100.000         150.000         0 of account         Inf Factor           wbonus %         0.00 %         0.00 %         0 of account         100.000         100.000           4d of 1         50.000         0 1103.000         0 1100.000         100.000         100.000           end of 2         52         50.001         0 1109.273         0 1102.576         0 105.662         0 105.662         end of 3           53         50.002         0 115.927         0 113.816         0 117.889         end of 4           64         54         50.002         0 115.927         0 113.816         end of 5           end of 4         55         50.002         0 115.927         0 113.816         end of 1           end of 5         55         50.002 <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>														
Account         Account         Individual Roth IRA           Year         Account         Income         Account         Income         Account         Name           Year         Account         Income         Account         Income         Account         Name           Year         Account         Income         Account         Income         Year         Year           Year         Account         Income         Account         Income         Year         Year           Year         S0         0.00 %         0.00 %         0.00 %         Income         Year           Year         S0         0.00 %         0.00 %         100.000         Inflactor         Inflactor           Year         S0         0.00 %         0.00 %         155.000         100.000         0         100.000         Inflactor           Year         S3         S0.002         0         1159.274         0         1105.062         end of 4         S4         S0.002         1115.277         0         165.958         0         110.286         110.286         end of 4           S4         S0.002         0         115.277         0         165.488         0         113.846				100	0.000	×	1							
Inling Izon         20 year         Checkings/Swings Account         Individual Roth IRA         Income         Account         Income         Account         Income         Account         Income         Year           Year         Account         Income         Account         Income         Account         Income         Year           Year         O         Account         Income         Account         Income         Year           Year         S0.00 %         S0.00 %         S0.00 %         S0.00 %         Year           Year         O.00 %         O.00 %         S0.00 %         Subtal           Year         O.00 %         O.00 %         Subtal         Inf Factor         Inf Factor           Whonus         S0.001 0         105,000 0         155,091 0         100,000 0         100,000 0         100,000 0           end of 1         S1         S0.002 0         119,273 0         160,253 0         100,000 0         100,000 0         100,000 0           end of 5         S5         S0.002 0         1112,527 0         162,533 0         1010,500 0         101,508 0         end of 3           end of 5         S5         S0.004 0         12,987 0         172,991 0         113,141 0         113,141 0				Acco	unts					10				
Year         Account         Inormal Normal Normal         Account         Income         Account         Income         Account         Distribution         Wages         SS         Total         Income         Year           tet return         50         0.00 %         3.00 %         0.00 %         <	Planning	20 yez s 🗸	Checkin	gs/Savings	Individu	al Both IBA			Inco	man x <sup>tt</sup>				
Year         Account         Income         Account         Income         Planed Distribution bunus         Year           50         0.00 %         3.00 %         100,000         Subtral         Infractor	Horizon	•	Ac	count	maividu	al Roth IRA			inco	mes				
bet return tial amount         50         0.00         8         0.00         100000         100000         100000         10000000         10	Year		Account	Income	Account	Income	Accounts	Planned	Wages	SS	Total	Year		
tial amount bonus %         50,000         100,000         Subtrail of account incremes         Subtrail 2.50 %         Inf Factor 150,000         Inf Factor incremes         Inf Factor 2.50 %         Inf Factor           end of 1         51         50,000         0         100,000         0         150,000         0         100,000         end of 1           sta         50,000         0         100,000         0         150,000         0         100,000         end of 2           end of 2         52         50,001         0         100,000         0         100,000         0         100,000         end of 2           end of 3         53         50,002         0         112,551         0         162,553         0         107,689         end of 4           end of 5         55         50,002         0         112,987         0         113,141         0         113,141         end of 6           end of 6         55         50,004         0         122,987         0         112,840         0         112,840         end of 7           end of 6         59         50,004         0         124,847         0         124,848         end of 7           end of 1         60         <	net return	50	0.00 %		3.00 %		Total	Distribution	wayes		moorne			
bonus         0.00         0.00         0         of account         Inf Factor         Inf Factor           whomus         50,000         100,000         150,000         100,000         100,000         100,000         100,000         100,000           end of 1         51         50,000         0         105,000         0         100,000         0         100,000         110,000         110,000	initial amount		50,000		100,000		150,000	Subtotal						
Withoms         50,000         100,000         150,000         100,000 <th< td=""><td>bonus %</td><td></td><td>0.00 %</td><td></td><td>0.00 %</td><td></td><td>0</td><td>of account</td><td>Infl Factor</td><td>Infl Factor</td><td></td><td></td><td></td><td></td></th<>	bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor				
end of 1       S1       S0,000       0       100,000       100,000       100,000       100,000       100,000       100,000       100,000       100,000	w/bonus	<b>C</b> 1	50,000	0	100,000	0	150,000	incomes	2.50 %	2.50 %	100.000	and of 1		
and d 3       S       boxon 2       0       109,273       0       199,274       0       105,062       end d 1         end d 4       S4       50,002       0       119,275       0       199,274       0       105,062       end d 1         end d 5       S5       50,002       0       115,927       0       107,689       0       107,689       end d 1         end d 5       S5       50,002       0       119,405       0       169,408       0       113,141       end o 1         end d 7       57       50,004       0       122,967       0       172,991       0       118,569       end o 17         end d 7       59       50,004       0       130,477       0       184,897       0       124,866       0       124,866       end o 19         end of 1       60       50,005       0       138,432       0       184,497       0       124,866       0       124,866       end of 11         end of 1       60       50,006       146,853       0       132,457       0       134,489       end of 13         end of 12       62       50,006       146,853       0       132,458       0 <td< td=""><td>end of 1</td><td>52</td><td>50,000</td><td>0</td><td>103,000</td><td>0</td><td>155,000</td><td>0</td><td>102,000</td><td>0</td><td>100,000</td><td>end of 1</td><td></td><td></td></td<>	end of 1	52	50,000	0	103,000	0	155,000	0	102,000	0	100,000	end of 1		
end of 4       54       50,002       0       112,851       0       162,553       0       107,689       end of 4         end of 5       50,002       0       115,927       0       165,930       0       110,381       end of 5         end of 6       56       50,003       0       119,405       0       169,408       0       113,141       end of 6         end of 7       57       50,004       0       122,987       0       175,969       0       175,969       end of 7         end of 8       50,004       0       126,677       0       176,681       0       118,869       end of 7         end of 10       60       50,005       0       134,439       0       121,440       0       121,840       end of 1         end of 11       61       50,006       0       138,432       0       188,439       0       131,249       end of 11         end of 12       62       50,006       0       142,576       0       132,439       0       132,049       end of 13         end of 14       64       50,007       0       155,797       0       202,5804       0       133,449       end of 14       64       5	end of 3	53	50,002	0	109,273	ő	159.274	ő	105.062	0	105.062	end of 3		
end of 5         55         50,002         0         115,927         0         165,930         0         110,381         0         110,381         end of 5           end of 5         65         50,003         0         119,400         0         113,141         0         113,141         end of 5           end of 7         57         50,004         0         122,987         0         172,991         0         118,869         end of 7           end of 8         58         50,004         0         126,677         0         176,681         0         118,869         end of 7           end of 1         60         50,005         0         138,477         0         180,482         0         121,840         end of 1           end of 1         60         50,006         0         138,429         0         128,008         end of 11           end of 12         62         50,006         146,853         0         196,860         0         132,489         end of 13           end of 14         64         50,007         151,259         0         201,266         0         137,851         end of 14           end of 15         50,008         0         155,797 <td>end of 4</td> <td>54</td> <td>50,002</td> <td>0</td> <td>112,551</td> <td>0</td> <td>162,553</td> <td>0</td> <td>107,689</td> <td>0</td> <td>107,689</td> <td>end of 4</td> <td></td> <td></td>	end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4		
end of 5         50003         0         119,405         0         169,408         0         113,141         113,141         113,141	end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5		
end of 7       57       50,004       0       122,997       0       112,996       0       115,969       end of 7         end of 8       50,004       0       122,697       0       176,661       0       118,869       end of 7         end of 9       59       50,004       0       126,677       0       176,661       0       118,869       end of 7         end of 10       60       50,005       0       134,392       0       124,840       0       121,840       end of 9         end of 11       61       50,006       0       138,423       0       188,429       0       128,008       0       128,008       end of 11         end of 12       62       50,006       0       142,575       0       192,582       0       134,499       end of 13         end of 14       64       50,007       0       155,797       0       201,266       0       137,481       end of 14         end of 15       50,008       0       155,797       0       201,266       0       33,600       33,001       end of 15         end of 15       50,008       0       155,797       0       202,804       0       0       33,6	end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6		
end of 8         58         50,004         0         126,677         0         176,051         0         118,869         0         118,869         end of 8           end of 9         50,004         0         130,477         0         180,482         0         121,840         end of 10           end of 10         60         50,005         0         133,437         0         124,886         0         124,886         end of 10           end of 10         60         50,006         0         138,432         0         188,429         0         124,886         end of 11           end of 12         62         50,006         0         142,576         0         192,582         0         131,209         end of 12           end of 13         64         50,006         146,853         0         196,860         0         137,851         end of 13           end of 14         64         50,007         0         155,797         0         201,864         0         137,851         end of 14           end of 14         64         50,008         0         155,797         0         201,873         0         33,800         end of 14           end of 15         65<	end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7		
end of 10         60         50,005         0         134,392         0         164,397         0         124,880         end of 10           end of 10         60         50,005         0         134,392         0         184,397         0         124,886         end of 10           end of 11         61         50,006         0         138,423         0         184,397         0         124,886         end of 11           end of 12         62         50,006         0         142,576         0         192,582         0         131,209         end of 12           end of 13         63         50,006         0         144,685         0         104,889         0         134,489         end of 13           end of 13         63         50,006         0         155,797         0         205,804         0         0         33,600         end of 15           end of 15         66         50,008         0         165,253         0         216,293         0         0         34,440         34,440         end of 16           end of 17         7         50,008         0         165,253         0         216,293         0         0         35,010	end of 8	58	50,004	0	126,677	0	176,681	0	118,869	0	118,869	end of 8		
Altor 10         Corr         Corr<         Cor<         Corr< <t< td=""><td>end of 9</td><td>59</td><td>50,004</td><td>0</td><td>130,477</td><td>0</td><td>180,482</td><td>0</td><td>121,840</td><td>0</td><td>121,840</td><td>end of 10</td><td></td><td></td></t<>	end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 10		
62       50,006       0       142,575       0       152,582       0       131,209       end of 12         end of 13       63       50,006       0       144,853       0       131,209       end of 12         end of 13       63       50,006       0       144,853       0       132,809       end of 14         end of 14       64       50,007       0       151,259       0       201,266       0       134,489       0       134,489         end of 15       65       50,008       0       155,797       0       205,804       0       0       33,600       end of 15         end of 16       66       50,008       0       166,717       0       204,799       0       0       34,440       end of 17         end of 17       7       50,008       0       165,253       0       0       34,440       add of 17         end of 18       68       50,009       0       170,245       0       220,252       0       0       36,184       end of 18         end of 18       68       50,010       0       170,245       0       220,252       0       0       38,015       end of 20         70 <td>end of 11</td> <td>61</td> <td>50,005</td> <td>0</td> <td>138.423</td> <td>0</td> <td>188,429</td> <td>0</td> <td>128,008</td> <td>0</td> <td>128,008</td> <td>end of 11</td> <td></td> <td></td>	end of 11	61	50,005	0	138.423	0	188,429	0	128,008	0	128,008	end of 11		
end of 13         63         50.006         0         146.853         0         196.860         0         134.489         0         134.489         end of 13           end of 14         64         50.007         0         151.259         0         201.266         0         137.851         end of 13           end of 15         65         50.008         0         155.797         0         205.804         0         0         33.600         a3.600         end of 15           end of 16         66         50.008         0         165.255         0         215.293         0         0         34.440         34.440         end of 16           end of 18         68         50.009         0         165.255         0         215.293         0         0         35.01         end of 17           end of 18         68         50.009         0         170.243         0         220.525         0         0         37.088         37.088         end of 18           end of 20         70         50.010         0         180.611         0         220.622         0         0         38.015         end of 20           70         50.010         0         180.611	end of 12	62	50,006	0	142,576	0	192,582	0	131,209	0	131,209	end of 12		
end of 14         64         50,007         0         15,259         0         201,266         0         137,851         end of 14           end of 15         65         50,008         0         155,797         0         205,804         0         0         30,800         adadot         15           end of 16         66         50,008         0         155,797         0         205,804         0         0         33,600         adadot         15           end of 16         66         50,008         0         165,285         0         210,479         0         0         34,440         and of 15           end of 18         68         50,009         0         170,243         0         202,522         0         0         35,301         ad,144         end of 18           end of 19         69         50,010         0         175,351         0         225,360         0         0         37,088         and of 12           end of 20         70         50,010         0         180,611         0         23,0621         0         0         36,105         and of 12           0         0         0         1,651,895         214,628         1,865,	end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13		
65         50,008         0         155,797         0         205,804         0         0         33,600         end of 15           end of 16         66         50,008         0         166,471         0         205,804         0         0         33,600         end of 15           end of 16         66         50,008         0         166,471         0         20,479         0         0         34,440         84,440         end of 16           end of 17         67         50,008         0         165,253         0         0         34,440         34,440         end of 17           end of 18         68         50,009         0         175,253         0         0         35,301         35,301         end of 18           end of 19         90         070,243         0         220,252         0         0         35,184         end of 18           end of 20         70         50,010         0         175,351         0         225,360         0         38,015         s8,015         end of 20           70         50,010         0         180,611         0         230,621         0         0         38,015         end of 20	end of 14	64	50,007	0	151,259	0	201,266	0	137,851	0	137,851	end of 14		
end of 16         66         50,008         0         166,471         0         210,479         0         0         34,440         34,440         and of 16           end of 17         67         50,008         0         165,265         0         215,293         0         0         35,011         end of 17           end of 18         68         50,009         0         170,243         0         220,252         0         0         35,104         35,101         end of 18           end of 19         69         50,010         0         175,351         0         225,360         0         37,088         37,088         end of 18           ond of 20         70         50,010         0         180,611         0         220,352         0         0         38,015         end of 18           ond of 20         70         50,010         0         180,611         0         220,352         0         0         38,015         end of 19           ond of 20         0         180,611         0         220,352         0         0         38,015         end of 20           Orange backgrounds indicate buothelical charter         0         0         1,651,895         214,628	end of 15	65	50,008	0	155,797	0	205,804	0	0	33,600	33,600	end of 15		
Or Of 1         SUUU8         U         to 25,285         U         215,293         U         0         35,301         eth of 17           68         50,009         0         170,243         0         220,522         0         0         36,184         651,184         end of 18           end of 19         69         50,010         0         175,351         0         225,360         0         0         37,088         end of 19           end of 20         70         50,010         0         186,611         0         220,621         0         0         38,015         s8,015         end of 19           orange backgrounds indicate burothelical entrurs         0         0         1,651,895         214,628         1,866,523	end of 16	66	50,008	0	160,471	0	210,479	0	0	34,440	34,440	end of 16		
Change of 19         COU         COULD NO         CO	end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17		
Change backgrounds indicate buotheling returns         Count         Coun	end of 19	60	50,009	0	175 351	0	220,252	0	0	30,184	37,088	end of 19		
0 0 0 1,651,895 214,628 1,866,523	end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20		
Oranne backgrounds indicate hypothetical returns				0		0		0	1,651,895	214,628	1,866,523	2		
	Orange ba	ckarounds inc	dicate hypoth	etical returns	×									

Step 5: Accounts: These columns represent the client's monetary account information. They include the account title, the monetary balance, the yearly growth percentage, and the yearly income growth amount. The grayed-out values indicate the starting balance for the current year, while the final row shows the projected monetary amounts.

												YOUR CASE LIST SETTINGS
												PREPARED BY:
												INITIAL PLAN DATE:
CLIENT DASHBO	DARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	ADVISOR /	ASSET ALLOCAT	TION AND NET	WORTH 0	RAPHS R	EPORTS 1	DOLS REVISED PLAN DATE:
Struct	ured li	ncom	e Pla	inina								
Edit Dynami	c Mode											
Scenario Rea	iding A Basic S	Structured Inc	ome Plan				~					
			Acco	unts	74							
Planning	20 years	Cheatile	an (Caulana			-	1		4			
Horizon	20 years V	Ac	count	Individu	al Roth IRA			Inco	mes 🗡			
Year		Account	Income	Account	Income	Accounts	Planned		SS	Total	Year	
net return	50	0.00 %		3.00 %		Total	Distribution	wages		Income		
initial amount		50,000		100,000		150,000	Subtotal					
bonus %		0.00 %		0.00 %		150,000	of account	Infl Factor	Infl Factor			
end of 1	51	50,000	0	103,000	0	153,000	0	100,000	2.50 %	100,000	end of 1	
end of 2	52	50,001	0	106,090	0	156,091	0	102,500	0	102,500	end of 2	
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3	
end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4	
end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5	
end of 7	50	50,003	0	122 987	0	172 991	0	115,141	0	115,141	end of 7	
end of 8	58	50,004	0	126.677	0	176.681	0	118.869	0	118.869	end of 8	
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9	
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10	
end of 11	61	50,006	0	138,423	0	188,429	0	128,008	0	128,008	end of 11	
end of 12	62	50,006	0	142,576	0	192,582	0	131,209	0	131,209	end of 12	
end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13	
end of 15	65	50,007	0	155,797	0	205,804	0	137,031	33,600	33,600	end of 14	
end of 16	66	50,008	0	160,471	0	210,479	0	0	34,440	34,440	end of 16	
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17	
end of 18	68	50,009	0	170,243	0	220,252	0	0	36,184	36,184	end of 18	
end of 19	69	50,010	0	175,351	0	225,360	0	0	37,088	37,088	end of 19	
end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20	
- 12 B			0		0		0	1,651,895	214,628	1,866,523		
Orange ba	ackgrounds in	dicate hypoth	etical returns	5								

Step 6: Accounts Total: This column represents the combined monetary total of all accounts. The final row of the

## table shows the projected monetary amount at the end of the timeline horizon.

													YOUR CASE LIST SETTINGS	HELP
				Lougur			00FT 111 001						PREPARED BY INITIAL PLAN DATE	
CLIENT DASHBO	ARD   STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX /	ADVISOR	ASSET ALLOCA	TION AND NET	WORTH   C	RAPHS   H	EPORTS	DOLS	REVISED PLAN DATE	
Structu	ured II	ncom	e Plar	nning										
Edit Dynamic	Mode			0										
Scapario			DI.											
Read	ling A Basic S	structured Inc	ome Plan				~							
			Acco	ounts	74	1								
Planning Horizon	20 years 🗸	Checkin Ac	gs/Savings count	Individu	al Roth IRA	•		Inco	mes 🔊 🖉					
Year	10000	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year			
net return initial amount	50	0.00 %		3.00 % 100,000		150,000	Subtotal							
w/bonus		50,000		100,000		150,000	incomes	2.50 %	2.50 %					
end of 1	51	50,000	0	103,000	0	153,000	0	100,000	0	100,000	end of 1			
end of 2	52	50,001	0	106,090	0	156,091	0	102,500	0	102,500	end of 2			
end of 4	54	50,002	0	112 551	0	162 553	0	107,689	0	107,689	end of 4			
end of 5	55	50,002	0	115,927	0	165,930	Ő	110,381	ő	110,381	end of 5			
end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6			
end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7			
end of 8	58	50,004	0	126,677	0	176,681	0	118,869	0	118,869	end of 8			
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9			
end of 11	61	50,005	0	138,423	0	188 429	0	124,080	0	124,080	end of 11			
end of 12	62	50,000	0	142.576	0	192.582	0	131,209	0	131,209	end of 12			
end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13			
end of 14	64	50,007	0	151,259	0	201,266	0	137,851	0	137,851	end of 14			
end of 15	65	50,008	0	155,797	0	205,804	0	0	33,600	33,600	end of 15			
end of 16	66	50,008	0	160,471	0	210,479	0	0	34,440	34,440	end of 16			
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17			
end of 18	60	50,009	0	170,243		220,252			35,184	35,184	end of 19			
end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20			
			0		0		0	1,651,895	214,628	1,866,523				
Orange ba	ckgrounds ind	dicate hypoth	etical returns	8										
	-	21												

Step 7: Planned Distribution: This column represents the amount deducted from the total income and allocated to the accounts each year.

												YOUR CASE LIST SETTINGS	HELP SIGN
												PREPARED BY:	
												INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	ADVISOR A	ASSET LLOCA	TION AND NET	WORTH   G	RAPHS R	EPORTS	TOOLS REVISED PLAN DATE:	
Structu	irod li	ncom	o Dlar	ning									
Structt	ureu n	COIII	eria	ming									
Edit Dynamic	Mode												
Our state in the state of the s							_						
Scenario Rea	ding A Basic S	Structured Inc	ome Plan				ľ						
	Ì				JK	1							
			Acco	ounts	~								
Planning Horizon	20 years ∨	Checkin	gs/Savings count	Individu	al Roth IRA	1	+	Inco	mes 📈				
Year	1000	Account	Income	Account	Income	Accounts Total	Planned	Wages	SS	Total Income	Year		
net return	50	0.00 %		3.00 %									
initial amount		50,000		100,000		150,000	Subtotal						
bonus %		0.00 %		0.00 %		150,000	of account	Infl Factor	Infl Factor				
w/bonus end of 1	51	50,000	0	100,000	0	150,000	Incomes	2.50 %	2.50 %	100.000	end of 1		
end of 2	52	50,000	0	106,000	o o	156.091	0	102,500	0	102,500	end of 2		
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3		
end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4		
end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5		
end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6		
end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7		
end of 8	58	50,004	0	126,677	0	1/6,681	0	118,869	0	118,869	end of 8		
end of 10	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 10		
end of 11	61	50,005	0	138 423	0	188 429	0	128,000	0	128,008	end of 11		
end of 12	62	50,006	0	142.576	0	192,582	0	131,209	0	131,209	end of 12		
end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13		
end of 14	64	50,007	0	151,259	0	201,266	0	137,851	0	137,851	end of 14		
end of 15	65	50,008	0	155,797	0	205,804	0	0	33,600	33,600	end of 15		
end of 16	66	50,008	0	160,471	0	210,479	0	0	34,440	34,440	end of 16		
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17		
end of 18	68	50,009	0	170,243	0	220,252	0	0	36,184	36,184	end of 18		
end of 19	69	50,010	0	175,351	0	225,360	0	0	37,088	37,088	end of 19		
	70	50 0 10	0	180 611	0	230.621	0	0	38.015	38.015	end of 20		
end of 20	/0	00,010		100,011		200,021			00,010				

Step 8: Client's Wages: This column is part of the income section and represents the client's yearly wage. The grayed-out section displays the inflation factor percentage for the yearly wage increase. The starting wage amount

corresponds to the value entered on the income page. Similarly, the inflation factor percentage aligns with the percentage specified on the income page.

												YOUR CASE LIST	SETTINGS	HELP SIGN
													PREPARED BY:	
												INITIA	AL PLAN DATE:	
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	ADVISOR A	SSET ALLOCAT	TION AND NET	WORTH G	RAPHS R	EPORTS	TOOLS REVISE	ED PLAN DATE:	
Struct	ured Ir	ncom	e Plar	nnina										
Edit Dynamic	Mode		• • • • • •											
Dynamic	mode													
Scenario Rea	ding A Basic S	Structured Inc	ome Plan				$\checkmark$							
	ī				, K	1								
			Acco	unts										
Planning Horizon	20 years 🗸	Checkin	gs/Savings count	Individua	al Roth IRA			Inco	mes 📈					
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year			
net return	50	0.00 %		3.00 %		450.000								
honus %		50,000		0.00 %		150,000	of account	Infl Factor	Infl Factor					
w/bonus		50,000		100,000		150,000	incomes	2.50 %	2.50 %					
end of 1	51	50,000	0	103,000	0	153,000	0	100,000	0	100,000	end of 1			
end of 2	52	50,001	0	106,090	0	156,091	0	102,500	0	102,500	end of 2			
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3			
end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4			
end of 6	55	50,002	0	119,927	0	169,409	0	112 141	0	110,301	end of 6			
end of 7	57	50,003	0	122 987	0	172 991	0	115,969	0	115,969	end of 7			
end of 8	58	50,004	Ő	126,677	0	176,681	0	118,869	0	118,869	end of 8			
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9			
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10			
end of 11	61	50,006	0	138,423	0	188,429	0	128,008	0	128,008	end of 11			
end of 12	62	50,006	0	142,576	0	192,582	0	131,209	0	131,209	end of 12			
end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13			
end of 15	65	50,007	0	151,259	0	201,200	0	137,851	33,600	33,600	end of 15			
end of 16	66	50,008	0	160.471	0	210,479	0	0	34 440	34,440	end of 16			
end of 17	67	50,008	Ő	165,285	0	215,293	0	0	35,301	35,301	end of 17			
end of 18	68	50,009	0	170,243	0	220,252	0	0	36,184	36,184	end of 18			
end of 19	69	50,010	0	175,351	0	225,360	0	0	37,088	37,088	end of 19			
end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20			
			0		0		0	1,651,895	214,628	1,866,523				
Orange ba	ckgrounds inc	dicate hypoth	etical returns											

Step 9: Social Security: This column represents the Social Security distribution amount. The monetary amount begins at the retirement age specified in the client information section of the client dashboard. The inflation factor corresponds to the percentage entered in the income section of the client dashboard.

												YOUR CASE LIST SETTINGS	HELP SIGN
												PREPARED BY:	
												INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCAT	TION AND NET	WORTH   G	RAPHS R	EPORTS	TOOLS REVISED PLAN DATE:	
Ctructu	urad b	2000		ning									
Sirucii	ured II	ICOIII	e Plai	ining									
Edit Dynamic	Mode												
Scenario Rea	ding A Basic S	Structured Inc	ome Plan				~						
	1				×	i i							
			Acco	ounts	7								
Planning	20 years 🗸	Checkin	gs/Savings	Individu	al Roth IRA			Inco	mes 🗸 🤘				
IOTIZOTI		AC	count			Accounts	Planned			Total	10000000		
Year		Account	Income	Account	Income	Total	Distribution	Wages	SS	Income	Year		
net return	50	0.00 %		3.00 %									
initial amount		50,000		100,000		150,000	Subtotal	Infl Contor	Infl Contor				
Donus %		50,000		100.000		150.000	or account	2 50 %	2 50 %				
end of 1	51	50,000	0	103,000	0	153,000	ncomes	100.000	2.50 %	100.000	end of 1		
end of 2	52	50.001	ő	106.090	ő	156.091	ő	102,500	ő	102,500	end of 2		
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3		
end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4		
end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5		
end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6		
end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7		
end of 8	58	50,004	0	126,677	0	176,681	0	118,869	0	118,869	end of 8		
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9		
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10		
end of 11	61	50,006	0	138,423	0	188,429	0	128,008	0	128,008	end of 11		
end of 12	62	50,006	0	142,570	0	192,582	0	131,209	0	131,209	end of 12		
end of 14	64	50,000	0	151 259	0	201 266	0	137,851	0	137,851	end of 14		
end of 15	65	50,007	0	155 797	0	205,804	0	.07,001	33,600	33,600	end of 15		
end of 16	66	50,000	0	160,471	0	210.479	0	0	34 440	34 440	end of 16		
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17		
end of 18	68	50,009	0	170,243	0	220.252	Ő	0	36,184	36,184	end of 18		
end of 19	69	50,010	0	175,351	0	225,360	0	0	37,088	37,088	end of 19		
end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20		
			0		0		0	1,651,895	214,628	1,866,523			
Orange ba	ckarounds ind	licate hypoth	etical returns	2									

## Step 10: Total Income: This column represents the combined total of all income amounts.

												YOUR CASE LIST SETTINGS	HELI
												PREPARED B	
										_		INITIAL PLAN DAT	
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET	WORTH   C	SRAPHS F	EPORTS   1	DOLS REVISED PLAN DAT	
Structu	urod lu	acom	o Dlar	ning									
Structt	areu n	ICOIII	eria	innig									
Edit Dynamic	Mode												
Scenario Read	ding A Basic S	structured Inc	ome Plan				$\sim$						
					×								
			Acco	unts	7								
Planning	20 years 🗸	Checkin	gs/Savings	Individu	al Poth IPA		1	Inco	mae 7 <sup>k</sup>				
Horizon		Ac	count	maividu	ar nour ina		_	inco	T				
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year		
net return	50	0.00 %		3.00 %									
initial amount		50,000		100,000		150,000	Subtotal	Infl Faster	Infl Contor				
w/bonus		50,000		100.000 %		150.000	incomes	2 50 %	2 50 %				
end of 1	51	50,000	0	103,000	0	153.000	0	100.000	0	100.000	end of 1		
end of 2	52	50,001	0	106,090	0	156,091	0	102,500	0	102,500	end of 2		
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3		
end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4		
end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5		
end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6		
end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7		
end of 8	58	50,004	0	126,677	0	176,681	0	118,869	0	118,869	end of 8		
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9		
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10		
end of 12	62	50,006	0	142 576	0	102 592	0	128,008	0	128,008	end of 12		
end of 13	63	50,006	0	146 853	0	196,860	0	134 489	0	134 489	end of 13		
end of 14	64	50,007	0	151 259	0	201 266	0	137 851	0	137 851	end of 14		
end of 15	65	50.008	0	155,797	0	205,804	0	0	33.600	33.600	end of 15		
end of 16	66	50.008	0	160,471	0	210,479	0	0	34,440	34,440	end of 16		
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17		
end of 18	68	50,009	0	170,243	0	220,252	0	0	36,184	36,184	end of 18		
end of 19	69	50,010	0	175,351	Ő	225,360	0	0	37,088	37,088	end of 19		
end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20		
			0		0		0	1,651,895	214,628	1,866,523			
								1					

Step 11: Year: The leftmost and rightmost columns represent the years within the timeframe. The final row indicates the last year of the planning horizon.

												YOUR CASE LIST SETTINGS
												PREPARED BY
-												INITIAL PLAN DATE
CLIENT	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH   G	RAPHS R	EPORT	IOLS PEVISED DI AN DATE
												REVISED PERIODALE
Struct	ured II	ncom	e Plar	nning								
Edit vnami	c Mode			-								
Scenaro Rea	ding A Basic S	structured Inc	ome Plan				~					
			Acco	ounts	74						- I -	
Plannin	20 years V	Checkin	as/Savinas						_14		- <b>1</b>	
Horizol	20 years	Ac	count	Individu	al Roth IRA			Inco	mes		•	
Year		Account	Income	Account	Income	Accounts	Planned	Wages	SS	Total	Year	
net return	50	0.00 %		3.00 %				inger				
initial amount		50,000		100,000		150,000	Subtotal					
bonus %		0.00 %		0.00 %		150,000	of account	Infl Factor	Infl Factor			
w/bonus	51	50,000	0	103,000	0	150,000	incomes	2.50 %	2.50 %	100.000	and of 1	
end of 2	52	50,000	o o	106,000	o o	156.091	0	102,500	0	102,500	end of 2	
end of 3	53	50,002	0	109,273	0	159,274	0	105,062	0	105,062	end of 3	
end of 4	54	50,002	0	112,551	0	162,553	0	107,689	0	107,689	end of 4	
end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5	
end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6	
end of 2	58	50,004	0	122,987	0	172,991	0	118,969	0	118,969	end of P	
end of 9	59	50,004	0	130,477	0	180,482	0	121.840	0	121.840	end of 9	
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10	
end of 11	61	50,006	0	138,423	0	188,429	0	128,008	0	128,008	end of 11	
end of 12	62	50,006	0	142,576	0	192,582	0	131,209	0	131,209	end of 12	
end of 13	63	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13	
end of 14	64	50,007	0	151,259	0	201,266	0	137,851	0	137,851	end of 14	
end of 15	65	50,008	0	155,797	0	205,804	0	0	33,600	33,600	end of 15	
and af 10	67	50,008	0	165,295	0	210,479	0	0	34,440	34,440	end of 16	
end of 16 end of 17		50,008		170.243	0	220,252	0	0	36,184	36,184	end of 18	
end of 16 end of 17 end of 18	68	50.004			· · · ·	220,202		0	07,004	07,000		
end of 16 end of 17 end of 18 end of 19	68 69	50,009	0	175,351	0	225,360	0	0	37,088	37,088	end of 19	
end of 16 end of 17 end of 18 end of 19 end of 20	68 69 70	50,009 50,010 50,010	0	175,351 180,611	0	225,360 230,621	0	0	37,088 38,015	37,088	end of 19 end of 20	

Step 12: Sum Amounts: The final row of the planning scenario displays the total sum of the amounts in the account and income columns.

												YOUR CASE LIST SETTINGS	HELP SIGN OU
-												PREPARED BY:	
												INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCAT	TION AND NET	WORTH 0	RAPHS F	EPORTS	TOOLS REVISED PLAN DATE:	
												REVISED FERTURE.	
Structu	ured Ir	ncom	e Plar	nning									
Edit Dynamic	Mode			0									
	Sector Sector												
Scenario Read	ding A Basic S	tructured Inc	ome Plan				~						
	[		A	unte	2 <sup>kl</sup>								
- e			ACCO	units									
Planning	20 years 🗸	Checkin	gs/Savings	Individu	al Roth IRA			Inco	mes 7 <sup>k'</sup>				
Horizon		Ac	count	marriad				1100	1				
Year		Account	Income	Account	Income	Accounts	Distribution	Wages	SS	Total	Year		
net return	50	0.00 %		3.00 %									
initial amount		50,000		100,000		150,000	Subtotal						
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor				
W/bonus	E1	50,000	0	100,000	0	150,000	incomes	2.50 %	2.50 %	100.000	and of 1		
end of 7	52	50,000	0	105,000	0	156,000	0	102,500		102,000	end of 2		
end of 3	53	50.002	0	109,273	0	159 274	ő	105,062	0	105,062	end of 3		
end of 4	54	50.002	0	112,551	0	162.553	Ő	107.689	0	107.689	end of 4		
end of 5	55	50,002	0	115,927	0	165,930	0	110,381	0	110,381	end of 5		
end of 6	56	50,003	0	119,405	0	169,408	0	113,141	0	113,141	end of 6		
end of 7	57	50,004	0	122,987	0	172,991	0	115,969	0	115,969	end of 7		
end of 8	58	50,004	0	126,677	0	176,681	0	118,869	0	118,869	end of 8		
end of 9	59	50,004	0	130,477	0	180,482	0	121,840	0	121,840	end of 9		
end of 10	60	50,005	0	134,392	0	184,397	0	124,886	0	124,886	end of 10		
end of 11	61	50,006	0	138,423	0	188,429	0	128,008	0	128,008	end of 11		
end of 12	62	50,006	0	142,576	0	192,582	0	131,209	0	131,209	end of 12		
end of 13	03	50,006	0	146,853	0	196,860	0	134,489	0	134,489	end of 13		
end of 15	65	50,007	0	151,259	0	201,200	0	137,051	33,600	33,600	end of 15		
end of 16	66	50,008	0	160.471	0	210,004	0	0	34,440	34 4 40	end of 16		
end of 17	67	50,008	0	165,285	0	215,293	0	0	35,301	35,301	end of 17		
end of 18	68	50,009	0	170,243	0	220.252	0	0	36,184	36,184	end of 18		
end of 19	69	50,010	0	175,351	0	225,360	0	0	37,088	37,088	end of 19		
end of 20	70	50,010	0	180,611	0	230,621	0	0	38,015	38,015	end of 20		
			0		0		0	1,651,895	214,628	1,866,523	-		
Orange ba	ckgrounds inc	licate hypoth	etical returns	0									

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