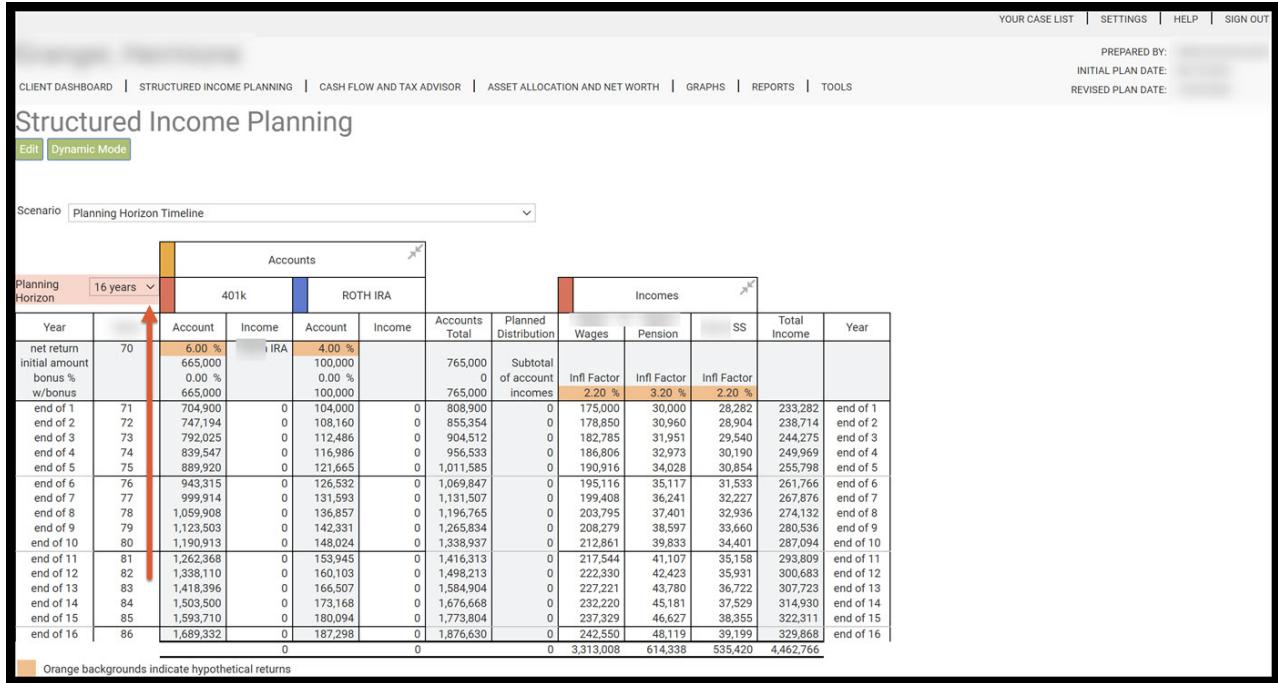


Planning Horizon Timeline

01/12/2026 10:12 am EST

In the structured income plan the Planning Horizon Timeline controls the timeline for the plan. The default is set for 16 years out for all clients. The timeline range starts at 16 years and the selections are by four-year increments. The shortest time frame is 16 years, the longest timeframe is 40 years. After selecting the year, the structured income plan will automatically be saved at this timeline so the next time you log in, it will already be saved at the last timeline you have chosen. This timeline can be edited. Below are the step-by-step instructions to adjust the planning horizon timeline.

Step 1: Dropdown Carrot Arrow: Click on the down carrot arrow in the planning horizon text box and select which year you would like to use.



The screenshot shows the 'Structured Income Planning' page. At the top, there are navigation links: 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. To the right, there are buttons for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. Below the header, the title 'Structured Income Planning' is displayed, along with 'Edit' and 'Dynamic Mode' buttons. The main content is a table titled 'Planning Horizon Timeline'. The table has two main sections: 'Accounts' and 'Incomes'. The 'Accounts' section includes columns for 'Year', 'Account', 'Income', 'Account', and 'Income'. The 'Incomes' section includes columns for 'Year', 'Total Income', and 'Year'. The table shows data for a 16-year timeline, starting from year 70 and ending at year 86. The 'Planning Horizon' dropdown menu is open, showing '16 years' as the selected option. A red arrow points to the dropdown menu, indicating the step to change the timeline.

Step 2: Structured Income Planning Page: The new planning horizon timeline should be displayed.

Structured Income Planning

Edit Dynamic Mode

Scenario Planning Horizon Timeline

Planning Horizon	24 years	Accounts			Accounts Total	Planned Distribution	Incomes			Total Income	Year
		401k		ROTH IRA			Wages	Pension	SS		
		Year	Account	Income	Account	Income	Infl Factor	Infl Factor	Infl Factor		
net return	70		6.00 %		IRA	4.00 %					
initial amount			665,000			100,000					
bonus %			0.00 %			0.00 %					
w/bonus			665,000			100,000					
end of 1	71	704,900	0	104,000	0	808,900	0	175,000	30,000	28,282	233,282
end of 2	72	747,194	0	108,160	0	855,354	0	178,850	30,960	28,904	238,714
end of 3	73	792,025	0	112,486	0	904,512	0	182,785	31,951	29,540	244,275
end of 4	74	839,547	0	116,986	0	956,533	0	186,806	32,973	30,190	249,969
end of 5	75	889,920	0	121,665	0	1,011,585	0	190,916	34,028	30,854	255,798
end of 6	76	943,315	0	126,532	0	1,069,847	0	195,116	35,117	31,533	261,766
end of 7	77	999,914	0	131,593	0	1,131,507	0	199,408	36,241	32,227	267,876
end of 8	78	1,059,908	0	136,857	0	1,196,765	0	203,795	37,401	32,936	274,132
end of 9	79	1,123,503	0	142,331	0	1,265,834	0	208,279	38,597	33,660	280,536
end of 10	80	1,190,913	0	148,024	0	1,338,937	0	212,861	39,833	34,401	287,094
end of 11	81	1,262,368	0	153,945	0	1,416,313	0	217,544	41,107	35,158	293,809
end of 12	82	1,338,110	0	160,103	0	1,498,213	0	222,330	42,423	35,931	300,683
end of 13	83	1,418,396	0	166,507	0	1,584,904	0	227,221	43,780	36,722	307,723
end of 14	84	1,503,500	0	173,168	0	1,676,668	0	232,220	45,181	37,529	314,930
end of 15	85	1,593,710	0	180,094	0	1,773,804	0	237,329	46,627	38,355	322,311
end of 16	86	1,689,332	0	187,298	0	1,876,630	0	242,550	48,119	39,199	329,868
end of 17	87	1,790,692	0	194,790	0	1,985,482	0	247,886	49,659	40,061	337,606
end of 18	88	1,898,134	0	202,582	0	2,100,715	0	253,340	51,248	40,943	345,530
end of 19	89	2,012,022	0	210,685	0	2,222,706	0	258,913	52,888	41,843	353,644
end of 20	90	2,132,743	0	219,112	0	2,351,855	0	264,609	54,580	42,764	361,953
end of 21	91	2,260,707	0	227,877	0	2,488,584	0	270,430	56,327	43,705	370,462
end of 22	92	2,396,350	0	236,992	0	2,633,341	0	276,380	58,129	44,666	379,175
end of 23	93	2,540,130	0	246,471	0	2,786,602	0	282,460	59,989	45,649	388,098
end of 24	94	2,692,538	0	256,330	0	2,948,868	0	288,674	61,909	46,653	397,236
		0		0		0	5,455,701	1,059,067	881,704	7,396,471	

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: support@planscout.com.