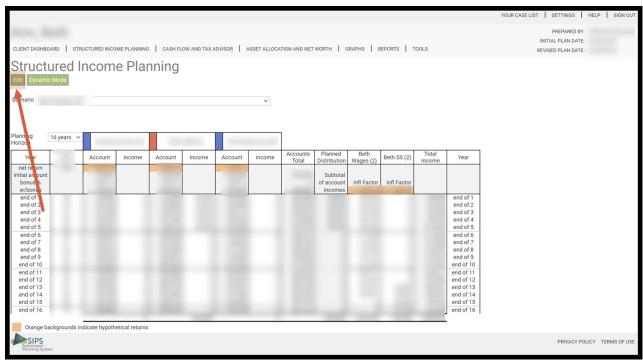
Annual Fixed Withdrawal Function

11/04/2024 1:35 pm EST

On the structured income planinng page, you have the ability to show deposits or withdrawals from the accounts on the structured income plan. There are multiple ways to do these functions. Below is a step-by-step guide for depositing and/or withdrawing monetary amounts through the annual fixed withdrawal function.



Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.

Step 2: Manage: Click on the green Manage button that is located in the incomes column for whichever account you would like to make edits to.

														YOUR CASE LIST SETTINGS	HELP SIGN OUT
ite														PREPARED BY:	
														INITIAL PLAN DATE:	
CLIENT DASHBOA	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSET ALLOCA	TION AND NET	WORTH 0	GRAPHS F	EPORTS 1	OOLS		REVISED PLAN DATE:	
Structu	ured Ir														
Edit Save Ca	ancel Add A	Add	d Income Ad	dd Inc Tax 🖌	Add Target	Edit or Add So	enario Dis	play Options							
Scenario						1	~								
								_							
Planning 1 Horizon	16 years ∨														
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Total Income	Year		
net return initial amount				-					Subtotal	Manage	Manage				
bonus %					-				of account	Infl Factor					
w/bonus			Manage		Manage		Manage		incomes						
end of 1 end of 2													end of 1 end of 2		
end of 3													end of 3		
end of 4													end of 4		
end of 5													end of 5		
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end of 11													end of 11		
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end of 13													end of 13		
end of 14													end of 14		
end of 15													end of 15		
end of 16													end of 16		
Orange bad	- ckgrounds ind	licate hypoth	etical returns										-		
SIPS Retirement Planning System	n													PRIVACY PO	LICY TERMS OF USE

Step 3: Withdrawals: Under the Structured Income Type Column Withdrawals section, click on the radio button next to the annual fixed withdrawal.

			YOUR C	ASE LIST SETTINGS	HELP	SIGN OUT
Manage Account						
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values						
Account name IRA Initial account balance \$100,000 Hypothetical return 6.0 % Bonus 0.0 % Optional Account description Optional account company	Structured Income Type Income Riders Start payout from income rider Liquidate or annuitize Annuitize (for years certain) 1.0 Liquidate account (in so many years)	ADD INCOME Pick year(s) OR Start year for rest of plan OR	Year 1 2 3 4 5 6 7 8	Income Data	Variable	4
Other		Start year for X years	0 9			
Tax calculation option Tax Income Distributions (Qualified)	Withdrawals	0	10			
Add money later - deferred account Years deferred Asset plan allocation Risk level	Annual fixed withdrawal Annual percentage withdrawal Annual percentage withdrawal O,0 % Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life)	Pick year(s) to remove Remove year to end of plan	12 13 14 15 16 17			
Account owner Account type Add an income rider Based on age Client2's age Joint Select income rider Number of months of psyout in first year 12.0	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account Make-up income gap based on target income	Reset all years	18 19 20 21 22 23 24		Þ	*
Enter manual payout Request Additional Rider Crange backgrounds indicate hypothetical returns	Annual Savings Annual fixed savings	Note that entere	ed values WILL N	IOT roll down to followin	ig years when	blank1
				PRIVAC	POLICY TER	MS OF USE

Step 4: Adding a Monetary Addition: To add money into an account, the numerical amount has to start with a negative symbol (-). The numerical number can be typed in with or without a comma, SIPS recognizes both styles of numbers. SIPS does not recognize the dollar mark (\$). Type in the monetary amount.

			YOUR	CASE LIST SETTING	S HELP S	SIGN OUT
Manage Account						
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values						
Account name IRA				a contract product		
	Structured Income Type Income Riders	ADD INCOME	Year	Income Data	Variable	
Initial account balance \$100,000	 Start payout from income rider 	ADDINGOME	1	meonie	valiable	Î
Hypothetical return 6.0 %		Pick year(s)	2			
Bonus 0.0 %		OR	3			
Bonus 0.0 %	Liquidate or annuitize		4			
Optional	Annuitize (for years certain) 1.0 %	Start year for rest of plan	6			
Account description	O Liquidate account (in so many years)	OR	0 7			
Optional account company Other		Start year for X years	8			
Outer			9			
Tax calculation option Tax Income Distributions (Qualified)	Withdrawals		10			
Add money later - deferred account	Annual fixed withdrawal -8,000	Pick year(s) to remove	12			
Years deferred 0	Annual percentage withdrawal 0.0 %		13			
Asset plan allocation	 Required minimum distribution (RMD) 		14			
Asset plan allocation Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	15			
Risk level			17			
Account owner		Reset all years	18			
	Calculated Plan Withdrawals		19			
Account type	 Make-up total owners RMD from one account 		20			
Add an income rider	 Make-up total benef RMD from one account 		21			
Based on 💿 age 🔿 Client2 's age 🔿 Joint	O Make-up income gap based on target income		23			
Select income rider	O make up income gap based on target income		24			*
Number of months of payout in first year 12.0		l	4		Þ	
Enter manual payout	Annual Savings					
	O Annual fixed savings					
Request Additional Rider Remove Income Rider						
Orange backgrounds indicate hypothetical returns		Note that entered	d values WILL N	OT roll down to follow	ing years when bl	lank1
SIPS Planning System				PRIVAG	CY POLICY TERMS	S OF USE

Option A: Pick Years:

Step 5: Income Data: In the Income Data box click on the numerical year(s) that you would like the monetary addition to be added to.

				YOUR CASE	LIST SETTINGS	HELP SIGN OUT
Manage Account						
Save Cancel View / Edit Income View / Edit Death B	lenefit View / Edit Actual Values					
Account name IRA Initial account balance \$100,000		Structured Income Type Income Riders	- ADD INCOME		Income Data	ariable
Hypothetical return 6.0 %		 Start payout from income rider 	Pick year(s)	✓ 1 ✓ 2 ✓ 3		
Bonus 0.0 % Optional Account description Optional account company Other		Liquidate or annuitize Annuitize (for years certain) 1.0 Liquidate account (in so many years)	Start year for rest of plan OR Start year for X years	 ✓ 4 ✓ 5 6 7 8 		
	tributions (Qualified) ~	Withdrawals Annual fixed withdrawal -8,000 Annual percentage withdrawal 0.0 % Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life)	Pick year (s) to remove	9 10 11 12 13 14 15 16		
Risk level	×		Reset all years	17 18		
Account type Add an income rider Based on age Client2 's age Select income rider Number of months of payout in first year	Joint v 12.0	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account Make-up income gap based on target income		19 20 21 22 23 24		*
Enter manual payout		Annual Savings Annual fixed savings	Note that entered	values WILL NOT	roll down to following	years when blank1
Retirement Planning System					PRIVACY P	POLICY TERMS OF USE

Step 6: Add Income: Click on the green Pick Years button.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Account Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values					
Account name IRA Initial account balance St00,000 Hypothetical return 6.0 % Bonus 0,0 % Optional Account description Optional Account company Other Tax caluation option Tax Income Distributions (Qualified) Add money later - deferred account o Add money later - deferred account o Add money later - deferred account o Account owner Account owner Account owner Account type Add an income rider Based on age Client2's age Joint Select income rider Enter manual payout I	Structured Income Type Income Riders Income Riders Annultize Annultize (for years certain) 10 Liquidate or annuitize Income Riders Liquidate account (in so many years) Withdrawals Annual fixed withdrawal Annual percentage withdrawal Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life) Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up income gap based on target income Annual Savings	Pick year(s) OR	In Income Year Income 2 2 3 4 5 6 6 7 8 9 9 9 10 11 12 13 14 15 16 17 16 17 16 17 18 22 23 24 24 24 24 24 25 24 24 24 24 25 24 24 25 24 25 25 26 27 27 26 27 27 27 27 27 27 27 27 27 27	come Data variable	•
Request Additional Rider Remove Income Rider	Annual fixed savings				
Orange backgrounds indicate hypothetical returns		Note that entered	values WILL NOT roll do	wn to following years when	blank1
SIPS References Flaving System				PRIVACY POLICY TER	MS OF USE

Step 7: Clicking: The monetary amount should move into the variable section of the Income Data table and the Income title Fixed should be correlated into the income data.

				YOUR CASE L	LIST SETTINGS HEL	P SIGN OUT
Manage Accoun	t					
	View / Edit Death Benefit View / Edit Actual Values					
Account name Initial account balance Hypothetical return Bonus Optional Account description Optional account company Other Tax calculation option Add money later - deferred account Years deferred	ROTH IRA (2) S100,000 6.0 0 Constrained of the second	Structured Income Type Income Riders Start payout from income rider Liquidate or annuitize Annuitize (for years certain) Liquidate account (in so many years) Withdrawals Annual fixed withdrawal Annual recentage withdrawal Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life)	ADD INCOME Pick year(s) OR Start year for rest of plan OR Start year for X years 0 Pick year(s) to remove Remove year to end of plan	1 1 2 1 3 1 4 1	Income Data	
Risk level	Aggressive		Reset all years	17 18		
Account owner Account type Add an income rider Based on	~	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account Make-up income gap based on target income		19 20 21 22 23 24		*
Enter manual payout		Annual Savings Annual fixed savings	Note that entered val	lues WILL NOT ro	oll down to following years	when blank1
Retirement Planning System					PRIVACY POLICY	TERMS OF USE

Step 8: Save: Once done click on the green Save button underneath the Manage Account subheading.

				YOUR	CASE LIST SETT	INGS HELP	SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	ROTH IRA (2)	Structured Income Type			Income Da	ata	
Initial account balance	\$100,000	Income Riders	ADD INCOME	Year	Income fixed	Variable -8,000	-
Hypothetical return	6.0 %	 Start payout from income rider 	Pick year(s)	2	fixed	-8,000	
Bonus	0.0 %	Liquidate or annuitize	OR	4	fixed	-8,000	
Optional Account description Optional account company Other		Annutize (for years certain) 1.0 %	Start year for rest of plan OR Start year for X years	5 6 7 8	fixed	-8,000	Ŀ
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12 13 14			
Asset plan allocation	Aggressive Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	15			
Risk level	Aggressive	 Beneficial IRA RMD (based on beneficiaries life) 		16 17			
Account owner	Beth ~	Calculated Plan Withdrawals	Reset all years	18			
Account type Add an income rider	ROTH V	O Make-up total owners RMD from one account		20			
	lient2 's age 🔘 Joint	 Make-up total benef RMD from one account 		22			
Select income rider	~	 Make-up income gap based on target income 		23			-
Number of months of payout in first ye	ear 12.0			•			*
Enter manual payout	ncome Rider	Annual Savings Annual fixed savings					
Orange backgrounds indicate hyp	pothetical returns		Note that entere	d values WILL I	NOT roll down to fo	llowing years whe	n blank1
SIPS Retirement Planning System					PF	RIVACY POLICY TE	ERMS OF USE

Step 9: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

CLENT DARHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADDOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS REVISED PLAN DATE Structured Income Planning Mdd Income Add Inc Tax Add Target Editor Add Scenario Display Options Scenario New Scenario (2)	SIGN OUT
CLENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVSOR ASSET ALLOCATION AND NET WORTH GRAPHS TOLS TOLS REVISED PLAN DATE Structured Income Add Income Account Income Account Income Account Income Account Income Account Income Year Income Year Income Year Income Account Income Year Inc	
Structured Income Planning New Scenario New Scenario (2) Planning New Scenario (2) Planning New Scenario (2) Planning New Scenario (2) New Scenario	
Earle Add Income Add Income Add Income Add Income Add Income Edit or Add Scenario Display Options Scenario New Scenario (2)	
Earl Save Cancel Add Income Add Income Add Income Add Income Add Income Edit or Add Scenario Scenario New Scenario (2)	
Planning Horizon 16 years Account Income Accounts Planned Total Planned Distribution Wages (2) SS (2) Total Income Year Menage Account Income Account Income Accounts Distribution Wages (2) SS (2) Total Income Year Interteum initial amount bonus 100,000 Manage M	
Horizon Pare Account Income Account Income Account Total Distribution Wages (2) SS (2) Total Income Year net return initial amount bonus % w/bonus 6.00 % 100.00 Manage end of 1 end of 1 100.00 % 0.00 % Manage Manage Manage Manage Manage end of 2 end of 1 114.000 (8.000) 161245 (8.000) end of 3 end of 4 end of 4 end of 4 114.570 (8.000) (8.000) end of 4 end of 5 end of 6 end of 4 121.3949 (8.000) 161.245 (8.000) end of 6 end of 6 end of 6 201.934 0 0 239.434 0 end of 9 end of 9 end of 10 239.434 0 0 end of 11 end of 11	
Horizon RA Year Account Income Account Income Account Total Usage (2) SS (2) Total Income Year net return Initial amount bonus % w/bonus Manage 6.00 % Manage Manage <td></td>	
Horizon Account Income Account Income Account Income Total Distribution Wages (2) SS (2) Total Total net return initial amount bonus % w/bonus Manage 6.00 % Manage Manage Manage Manage end of 1 end of 2 end of 3 end of 4 end of 7 end of 8 end of 9 end of 9 end of 1 114,000 (8.000) Manage Manage end of 1 end of 2 end of 6 end of 7 end of 8 end of 9 end of 1 128,840 (8.000)	
Verify Account income Account income Account income Total Distribution Wages (2) SS (2) Income Year Interterum 100.000 100.000 100.000 Income Manage Manage Manage Manage Manage Manage Manage Inf Factor	
Initial amount bonus Manage Manage Manage Manage Manage end of 1 end of 2 end of 3 end of 3 end of 4 end of 5 end of 6 end of 7 end of 7 end of 8 end of 9 end of 9 end of 9 end of 1 100,000 (8,000) Manage Manage Manage Manage end of 1 end of 2 end of 3 end of 4 end of 5 end of 6 end of 7 end of 8 end of 9 end of 9 end of 1 161,245 (8,000) (8,000) (8,000) end of 3 end of 4 end of 5 end of 6 end of 7 end of 8 end of 9 end of 9 end of 10 123,940 223,843 0 0 end of 1 end of 9 end of 11	
Manage 0.00 % Manage of account Infl Factor Infl Factor end of 1 110,000 Manage incomes end of 2 end of 1 end of 2 1128,840 (8,000) end of 3 end of 3 end of 3 end of 4 1161,245 (8,000) end of 5 end of 4 end of 6 189,554 0 end of 6 end of 7 201,034 0 end of 7 end of 8 213,096 0 end of 9 end of 10 239,434 0 end of 1	
Withomus Manage Incomes end of 1 end of 1 114,000 (8,000) end of 2 end of 1 end of 2 128,840 (8,000) end of 3 end of 1 end of 3 114,270 (8,000) end of 4 end of 4 end of 4 161,245 (8,000) end of 4 end of 4 end of 5 178,919 (8,000) end of 6 end of 6 end of 7 120,034 0 end of 7 end of 7 end of 9 223,086 0 end of 9 end of 9 end of 10 223,830 0 end of 11 end of 11	
end of 1 114,000 (8,000) end of 1 end of 2 128,840 (8,000) end of 2 end of 3 144,570 (8,000) end of 3 end of 4 161,245 (8,000) end of 4 end of 5 178,919 (8,000) end of 4 end of 6 189,654 0 end of 5 end of 7 201,034 0 end of 7 end of 8 239,843 0 end of 7 end of 9 225,881 0 end of 7 end of 10 239,434 0 end of 10	
end of 3 144,570 (6,000) end of 3 end of 4 161,245 (8,000) end of 4 end of 5 178,919 (8,000) end of 5 end of 6 178,919 (8,000) end of 5 end of 6 128,954 0 end of 7 end of 7 201,034 0 end of 7 end of 8 213,096 0 end of 9 end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 10	
end of 4 161,245 (8,000) end of 4 end of 5 178,919 (8,000) end of 5 end of 6 189,554 0 end of 6 end of 7 201,034 0 end of 7 end of 8 213,096 0 end of 8 end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 10	
end of 5 178.919 (8.000) end of 5 end of 6 189.654 0 end of 6 end of 7 201,034 0 end of 7 end of 8 213,096 0 end of 8 end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 11	
end of 6 189,654 0 end of 6 end of 7 201,034 0 end of 7 end of 8 213,096 0 end of 7 end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 10 end of 11 255,800 0 end of 11	
end of 7 201,034 0 end of 7 end of 8 213,096 0 end of 8 end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 10 end of 11 253,800 0 end of 11	
end of 8 213,096 0 end of 8 end of 8 end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 10 end of 11 255,800 0 end of 11	
end of 9 225,881 0 end of 9 end of 10 239,434 0 end of 10 end of 11 253,800 0 end of 11	
end of 10 239,434 0 end of 10 end of 11 253,800 0 end of 11	
end of 12 269,028 0 end of 12	
end of 13 end of 13 end of 13	
end of 14 a02,280 0 end of 14	
end of 15 320,417 0 end of 15 end of 16 339,642 0 end of 16	
end of 16 339,642 0 end of 16 (40,000)	
Orange backgrounds indicate hypothetical returns	
PRIVACY POLICY TER	MS OF USE

Option B: Start Years for the Rest of the Plan:

Step 10: Adding a Monetary Addition: To add money into an account, the numerical amount has to start with a negative symbol (-). The numerical number can be typed in with or without a comma, SIPS recognizes both

styles of numbers. Type in the monetary amount.

			YOUR C.	ASE LIST SETTING	BS HELP	SIGN OUT
Manage Account						
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values						
Account name IRA	Structured Income Type			Income Data		
Initial account balance \$100,000	Income Riders	ADD INCOME	Year	Income	Variable	
Hypothetical return 6.0 %	 Start payout from income rider 	Pick year(s)	2			
		OR	3			
Bonus 0.0 %	Liquidate or annuitize		4			
Optional	Annuitize (for years certain) 1.0 %	Start year for rest of plan	6			
Account description Optional account company	O Liquidate account (in so many years)	OR	7			
Other		Start year for X years	8			
Tax calculation option Tax Income Distributions (Qualified)	Withdrawals	0	10			
	Annual fixed withdrawal -2,000	Pick year(s) to remove	11			
Add money later - deferred account	Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12			
	Required minimum distribution (RMD)		14			
Asset plan allocation Sel	 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end of plan	15			
Risk level	0		17			
Account owner		Reset all years	18			
Account type	Calculated Plan Withdrawals Make-up total owners RMD from one account		19 20			
Add an income rider			21			
Based on 🔘 age 🔿 Client2 's age 🔿 Joint	Make-up total benef RMD from one account		22			
Select income rider	O Make-up income gap based on target income		23			*
Number of months of payout in first year 12.0		L	4			•
Enter manual payout	Annual Savings					
Request Additional Rider Remove Income Rider	Annual fixed savings					
Orange backgrounds indicate hypothetical returns		Note that entered	values WILL N	OT roll down to follow	ving years whe	en blank1
		Hote that effered	and the first fi		CY POLICY TI	

Step 11: Year: In the Income data table select which year you would like to start the years for the rest of the plan.

			YC	UR CASE LIST	INGS HELP	SIGN OUT
Manage Account						
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values						
Account name IRA				Income Da	to.	
Initial account halance	Structured Income Type Income Riders	ADD INCOME	Year	Income	Variable	A
Initial account balance \$100,000	 Start payout from income rider 		1			
Hypothetical return 6.0 %		Pick year(s)	2			
Bonus 0.0 %		OR				
0.0	Liquidate or annuitize		5			
Optional	Annuitize (for years certain) 1.0 %	Start year for rest of plan OR	6			
Account description Optional account company	O Liquidate account (in so many years)	OR	7			
Other		Start year for X years	8			
		0	10			
Tax calculation option Tax Income Distributions (Qualified)	Withdrawals		11			
Add money later - deferred account	Annual fixed withdrawal -2,000	Pick year(s) to remove	12			
Years deferred 0	Annual percentage withdrawal 0.0 %		13			
Asset plan allocation Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	14			
	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end or plan	16			
Risk level			17			
Account owner		Reset all years	18			
	Calculated Plan Withdrawals		19			
Account type	 Make-up total owners RMD from one account 		20			
Add an income rider	 Make-up total benef RMD from one account 		21			
Based on 💿 age 🔿 Client2 's age 🔿 Joint	O Make-up income gap based on target income		23			
Select income rider	0		24			*
Number of months of payout in first year 12.0						,
Enter manual payout	Annual Savings					
	Annual fixed savings					
Request Additional Rider Remove Income Rider						
Orange backgrounds indicate hypothetical returns		Note that entered	d values Wi	LL NOT roll down to fo	llowing years wh	en blank1
SIPS Puttering System				PF	IVACY POLICY T	TERMS OF USE

Step 12: Start Year for Rest of Plan: Click on the green button Start Year for Rest of Plan.

			YOUR C	CASE LIST SETTINGS	HELP	SIGN OUT
Manage Account						
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values						
Account name	Structured Income Type			Income Data		
Initial account balance \$100,000	Income Riders	ADD INCOME	Year 1	Income	Variable	*
Hypothetical return 6.0 %		Pick year(s) OR	2			
Bonus 0.0 %	Liquidate or annuitize		4 5			
Optional Optional account company Other Ot	Liquidate account (in so many years)	Start year for rest of plan OR Start year for X years	6 7 8 9			
Tax calculation option Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal	0 Pick year(s) to remove	10 11 12			
Add money later - deferred account Years deferred 0	Annual percentage withdrawal 0.0 %	Thek year(s) to terrificite	13			
Asset plan allocation Sel	Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	15			
Risk level			17			
Account owner	Calculated Plan Withdrawals	Reset all years	18			
Account type v Add an income rider	Make-up total owners RMD from one account		20			
Based on Beth 's age Client2 's age Joint	Make-up income gap based on target income		22			
Select income rider V Number of months of payout in first year 12.0			~ 24		÷	•
Enter manual payout	Annual Savings					
Request Additional Rider Remove Income Rider Orange backgrounds indicate hypothetical returns		Note that entered	d values WILL N	OT roll down to followin	ig vears when t	olank1
SIPS Pranning System					POLICY TERN	

Step 13: Clicking: The monetary amount should move into the Variable column and the title Fixed should be entered into the Income column of the Income Data table.

				Y	OUR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accoun	nt		\ \				
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type		Λ.	Income E	Data	
Initial account balance	\$100,000	Income Riders O Start payout from income rider	ADD INCOME	Ye r	Income	Variable	*
Hypothetical return	6.0 %	0	rion year(o)	2	\mathbf{N}		
Bonus	0.0 %	Liquidate or annuitize	OR	4	N		
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan	6			
Account description		 Liquidate account (in so many years) 	OR	7	fixed	-2,000	
Optional account company		0		8	fixed	-2,000	
Other			Start year for X years	9	fixed	-2,000	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10	fixed	-2,000	
Tax calculation option	Tax Income Distributions (Quanned)	Annual fixed withdrawal		11	fixed	-2,000	
Add money later - deferred account			Pick year(s) to remove	12	fixed	-2,000	
Years deferred	0	Annual percentage withdrawal 0.0 %		13	fixed	-2,000	
		 Required minimum distribution (RMD) 		14	fixed	-2,000	
Asset plan allocation	Sel		Remove year to end of plan	15	fixed	-2,000	
Risk level		 Beneficial IRA RMD (based on beneficiaries life) 		16	fixed	-2,000	
HISK ICTCI				17	fixed	-2,000	
Account owner	~		Reset all years	18	fixed	-2,000	
		Calculated Plan Withdrawals		19	fixed	-2,000	
Account type	~	 Make-up total owners RMD from one account 		20	fixed	-2,000	
Add an income rider		 Make-up total benef RMD from one account 		21	fixed	-2,000	
Based on 💿 age 🔾 Cl	lient2 's age 🔘 Joint			22	fixed	-2,000	
Select income rider	~	 Make-up income gap based on target income 		23	fixed	-2,000	-
Number of months of payout in first ye				4	IIIPII	-/1881	Þ
Enter manual payout							
		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove In	ncome Rider						
Orange backgrounds indicate hyp	pothetical returns		Note that entered	values W	ILL NOT roll down to f	ollowing years whe	n blank1
Retirement Planning System					F	PRIVACY POLICY T	RMS OF USE

Step 14: Save: Once done click on the green Save button underneath the Manage Account subheading.

				YOU	JR CASE LIST SE	TTINGS HELP	SIGN OUT
Manage Accoun	†						
	/iew / Edit Death Benefit View / Edit Actual Values						
Save Cancer view / Edicincome	View / Euit Actual Values						
Account name	IRA	Other strand languages Trans			Income	Data	
Initial account balance		Structured Income Type	ADD INCOME	Year	Income	Variable	
initial account balance	\$100,000	 Start payout from income rider 		1			
Hypothetical eturn	6.0 %		Pick year(s)	2			
Bonus	0.0 %		OR	3			
Donus	0.0 %	Liquidate or annuitize		5			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan	6			
Account description		 Liquidate account (in so many years) 	OR	7	fixed	-2,000	
Optional account company Other			Otert ware for V wares	8	fixed	-2,000	
Other			Start year for X years	9	fixed	-2,000	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10	fixed	-2,000	
Add money later - deferred account	2	Annual fixed withdrawal	Pick year(s) to remove	12	fixed	-2,000	
Years deferred	0	Annual percentage withdrawal 0.0 %		13	fixed	-2,000	
	0	Required minimum distribution (RMD)	· ·	14	fixed	-2,000	
Asset plan allocation	Sel		Remove year to end of plan	15	fixed	-2,000	
Risk level		 Beneficial IRA RMD (based on beneficiaries life) 		16	fixed	-2,000	
Nisk level			a constant and the sec	17	fixed	-2,000	
Account owner	~		Reset all years	18	fixed	-2,000	
Account type	~	Calculated Plan Withdrawals		20	fixed	-2,000	
Add an income rider		 Make-up total owners RMD from one account 		21	fixed	-2,000	
	ent2 's age O Joint	 Make-up total benef RMD from one account 		22	fixed	-2,000	
Select income rider		O Make-up income gap based on target income		23	fixed	-2,000	_
Number of months of payout in first yea	~			₹ 24	fixed	-2 000	• •
	ar 12.0						
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove Inc							
Orange backgrounds indicate hype	otnetical returns		Note that entere	ed values WIL	L NOT roll down to	rollowing years whe	n blank1
SIPS Retirement Planning System					8	PRIVACY POLICY TE	RMS OF USE

Step 15: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

														YOUR CASE LIST SETTINGS HELP SIGN OUT
						/								PREPARED BY:
														INITIAL PLAN DATE:
CLIENT DASHBOA	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX	DVISOR	ASSET ALLOCA	TION AND NET	WORTH	GRAPHS R	EPORTS 1	TOOLS		REVISED PLAN DATE:
Structu	ired Ir	ncom	o Plar	nina										
	ancel Add A				Add Tore 1	dit or Add Cr	enario Disp	Jay Options						
Eur Save Co	Add A	Ad				un of Add Sc	Dis	nay options						
Scenario							~							
					/									
Planning Horizon	16 years 🗸				IRA		_]						
Year	_	Account	Income	Account	Income	Account	Income	Accounts	Planned		SS (2)	Total	Year	
	_	Account	Income	Account	Income	Account	Income	Total	Distribution	Wages (2)	55 (2)	Income	Year	
net return initial amount				6.00 % 100,000					Subtotal					
bonus %				0.00 %					of account	Manage Infl Factor	Manage Infl Factor			
w/bonus			Manage	100,000	Manage		Manage		incomes	IIII Factor	IIIII Factor			
end of 1	_		manage	106,000	0				1 moonieo				end of 1	
end of 2				112,360	0								end of 2	
end of 3				119,102	0								end of 3	
end of 4				126,248	0								end of 4	
end of 5				133,823	0								end of 5	
end of 6				141,852	0								end of 6	
end of 7				152,363	(2,000)								end of 7	
end of 8				163,505	(2,000)								end of 8	
end of 9				175,315	(2,000)								end of 9	
end of 10				187,834	(2,000)								end of 10	
end of 11				201,104	(2,000)								end of 11	
end of 12 end of 13				215,170 230,080	(2,000) (2,000)								end of 12 end of 13	
end of 14				245,885									end of 14	
end of 15				262,638	(2,000)								end of 15	
end of 16				280,397	(2,000)								end of 16	
end of 10				200,397	(20,000)									
Orange bag	ckgrounds ind	licate hypoth	etical returns		(20,000)									
Retirement Planning System	n													PRIVACY POLICY TERMS OF USE

Option C: Start Years for X Years:

Step 16: Adding a Monetary Addition: To add money into an account, the numerical amount has to start with a negative symbol (-). The numerical number can be typed in with or without a comma, SIPS recognizes both

styles of numbers. Type in the monetary amount.

			YOUR C	ASE LIST SETTINGS	HELP SIGN OU
Manage Account					
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values					
Save Cancel View / Edit Income View / Edit Actual Values Account name IRA Initial account balance \$100.000 Hypothetical return 6.0 % Bonus 0.0 % Optional 0.0 % Optional account company	Structured Income Type Income Riders Start payout from income rider Liquidate or annuitize Annuitize (for years certain) Liquidate account (in so many years) Withdrawals Annual fixed withdrawal Annual fixed withdrawal Annual percentage withdrawal 0.0 Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life) Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account	ADD INCOME Pick year(s) OR Start year for rest of plan OR Start year for X years 0 Pick year(s) to remove Remove year to end of plan Reset all years	Year 1 2 3 4 5 6 7 8 9 10 11 11 12 13 14 16 16 17 18 19 20 12 21 22	Income Data	Variable
Select income rider	 Make-up income gap based on target income 	0	23		-
Number of months of payout in first year 12.0			4		• •
Enter manual payout	Annual Savings Annual fixed savings				
Orange backgrounds indicate hypothetical returns		Note that entered	values WILL N	OT roll down to followin	ng years when blank1
SIPS Retrement Farming System				PRIVAC	Y POLICY TERMS OF US

Step 17: Year: In the Income data table select which year you would like to start the monetary addition.

				YOUR CA	SE LIST SETTING	S HELP	SIGN OUT
Manage Accour	1†						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	ROTH IRA (2)	Structured Income Tune			Income Data		
Initial account balance	\$100,000	Structured Income Type Income Riders	ADD INCOME	Year	Income	Variable	
	\$100,000	O Start payout from income rider	\odot	1			
Hypothetical return	6.0 %		Pick year(s)	3			
Bonus	0.0 %		OR	4			
Optional		Liquidate or annuitize Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description			OR	6			
Optional account company		 Liquidate account (in so many years) 		8			
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
		Annual fixed withdrawal -5,000	Pick year(s) to remove	11 12			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal 0.0 %		12			
	0	Required minimum distribution (RMD)		14			
Asset plan allocation	Aggressive Sel		Remove year to end of plan	15			
Risk level	Aggressive	 Beneficial IRA RMD (based on beneficiaries life) 		16 17			
			Reset all years	18			
Account owner	Beth ~	Calculated Plan Withdrawals		19			
Account type	ROTH ~	 Make-up total owners RMD from one account 		20			
Add an income rider		Make-up total benef RMD from one account		21 22			
Based on 💿 Beth 's age 🔘 C	lient2 's age 🔘 Joint			22			
Select income rider	~	 Make-up income gap based on target income 		24			-
Number of months of payout in first ye	ear 12.0		.4)	
Enter manual payout		Annual Savings					
line (antipology residence) as		Annual fixed savings					
Request Additional Rider Remove In							
Orange backgrounds indicate hyp	pothetical returns		Note that entered va	lues WILL NO	T roll down to follow	ing years when	blank1
SIPS Retirement Planning System					PRIVA	CY POLICY TEF	MS OF USE

Step 18: Start Year for X Years Text Box: Within the text box for Start Year fox X Years, type in the how many years you would like the monetary amount to be distributed.

				YOU	JR CASE LIST SETTIN	GS HELP	SIGN OUT
Manage Account							
Save Cancel View / Edit Income View / Edit Death	Benefit View / Edit Actual Values						
Account name IRA		Structured Income Type			Income Data		
Initial account balance \$100,000		Income Riders O Start payout from income rider	ADD INCOME	Year 1	Income	Variable	
Hypothetical return 6.0	%	0	Pick year(s)	2			
Bonus 0.0 9	%	Liquidate or annuitize	OR	4			
Optional Account description		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR				
Optional account company Other		 Liquidate account (in so many years) 	Start year for X years				
Tax calculation option Tax Income Dis	stributions (Qualified)	Withdrawals	5				
Add money later - deferred account		Annual fixed withdrawal _5,000 Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12			
Years deferred 0 Asset plan allocation		Required minimum distribution (RMD)	Remove year to end of plan	14			
Risk level	Sel	O Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	16			
Account owner	~		Reset all years	17 18			
Account type	~	Calculated Plan Withdrawals Make-up total owners RMD from one account		19 20			
Add an income rider		 Make-up total benef RMD from one account 		21			
Based on 💿 age 🔿 Client2 's age 🔿) Joint			22			
Select income rider	~	 Make-up income gap based on target income 		24			-
Number of months of payout in first year	12.0						
Enter manual payout		Annual Savings					
Request Additional Rider Remove Income Rider		Annual fixed savings					
Orange backgrounds indicate hypothetical returns			Note that entere	ed values WIL	L NOT roll down to follo	wing years whe	n blank1
SIPS Retirement Phanned System					PRIV	ACY POLICY TE	RMS OF USE

Step 19: Start Years for X Years: Click on the green button Start Years for X Years.

				YOUR	CASE LIST SETTING	S HELP	SIGN OUT
Manage Accoun	1†						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income Data		
Initial account balance	\$100,000	Income Riders	ADD INCOME	Year	Income	Variable	
		 Start payout from income rider 					
Hypothetical return	6.0 %		Pick year(s)	3			
Bonus	0.0 %	Liquidate or annuitize	OR	4			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description		Liquidate account (in so many years)	OR				
Optional account company		O Elquidate account (in so many years)		8			
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	5	10			
Add money later - deferred account		Annual fixed withdrawal -5,000	Pick year(s) to remove	11			
Years deferred		Annual percentage withdrawal 0.0 %		13			
		Required minimum distribution (RMD)	0.00 M	14			
Asset plan allocation	Sel	 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end of plan	15			
Risk level				17			
Account owner	~		Reset all years	18			
		Calculated Plan Withdrawals		19			
Account type Add an income rider	~	 Make-up total owners RMD from one account 		20			
	lient2 's age 🔘 Joint	 Make-up total benef RMD from one account 		22			
Based on age CI Select income rider		O Make-up income gap based on target income		23			_
Number of months of payout in first ye				₹ 24			Þ i
Enter manual payout	2ar 12.0						
Enter manaar payout		Annual Savings					
Request Additional Rider Remove In	icome Rider	Annual fixed savings					
Orange backgrounds indicate hyp			Note that entere	ed values WILL N	NOT roll down to follow	ing years whe	n blank1
SIPS Retirement Panning System						CY POLICY TE	

Step 20: Clicking: The monetary amount should move into the variable section of the Income Data table and the term Fixed should move into the Income column of the Income Data table.

			YOUR CASE I	LIST SETTINGS H	IELP SIGN OUT
Manage Account					
Account name IRA Initial account balance \$100.000 Hypothetical return 6.0 %	Structured Income Type Income Riders O Start payout from income rider	ADD INCOME	1	Income Data ncome Variat fixed -5,00 fixed -5,00	0
Bonus 0.0 % Optional	Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Pick year(s) OR Start year for rest of plan OR OR	4	fixed -5,00 fixed -5,00 fixed -5,00	0
Account description Optional account company Other Tax calculation option Tax Income Distributions (Qualified)	O Liquidate account (in so many years) Withdrawals	Start year for X years	7 8 9 10		
Add money later - deferred account	Annual fixed withdrawal Annual percentage withdrawal Annual percentage withdrawal 0.0 % Required minimum distribution (RMD)	Pick year(s) to remove	11 12 13 14 15		
Risk level	O Beneficial IRA RMD (based on beneficiaries life)	Reset all years	16 17 18		
Account owner	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account Make-up income gap based on target income		19 20 21 22 23 24		*
Enter manual payout	Annual Savings Annual fixed savings	Note that entered va	lues WILL NOT n	roll down to following yea	rs when blank1
SIPS Planning System				PRIVACY POLIC	CY TERMS OF USE

Step 21: Save: Once done click on the green Save button underneath the Manage Account subheading.

				YOUR	CASE LIST SET	TTINGS HELP	SIGN OUT
Manage Accoun	1t						
	View / Edit Death Benefit View / Edit Actual Values						
Account name Initial advount balance Hypothetici return Bonus Optional Account description Optional account company Other	IRA S100.000 6.0 % 0.0 %	Structured Income Type Income Riders Start payout from income rider Liquidate or annuitize Annuitize (for years certain) Liquidate account (in so many years)	ADD INCOME Pick year(a) OR Start year for rest of plan OR Start year for X years	Year 1 2 3 4 5 6 7 8 9 9	Income I fixed fixed fixed fixed fixed fixed	Data -5,000 -5,000 -5,000 -5,000 -5,000	*
Tax calculation option Add money later - deferred account Years deferred	Tax Income Distributions (Qualified) v	Withdrawals Annual fixed withdrawal Annual percentage withdrawal 0.0	Pick year(s) to remove	10 11 12 13			Ŀ
Asset plan allocation	Sel	Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	14 15 16			
Risk level				17			
Account owner	~	Calculated Plan Withdrawals	Reset all years	18			
Account type Add an income rider Based on	↓ lient2's age ○ Joint	Make-up total owners RMD from one account Make-up total benef RMD from one account		20 21 22			
Select income rider	~	O Make-up income gap based on target income		23			-
Number of months of payout in first ye	ear 12.0			•			•
Enter manual payout	ncome Rider	Annual Savings					
Orange backgrounds indicate hyp	pothetical returns		Note that entere	d values WILL	NOT roll down to f	following years whe	n blank1
SIPS Retirement Planning System					;	PRIVACY POLICY TE	RMS OF USE

Step 22: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

						1								YOUR CASE LIST SETTINGS	HELP SIGN OUT
and the														PREPARED BY	:
CLIENT DASHBO							COLT ALLOCA	TION AND NET				2001 8		INITIAL PLAN DATE	
and the second	202 A 0200						SSET ALLOGA	TION AND NET	WORTH 1 C	SKAPIIS K	LPORIS I	UULS		REVISED PLAN DATE	-
Structu	ured Ir	ncom	e Plar	nning											
Edit Save C	ancel Add A	ccount Add	Income A	dd Inc Tax A	dd Target	dit or Add Sc	enario Disp	olay Options							
Scenario							~								
Planning	16 years ∨							1							
Horizon	io jeuro				24										
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Total Income	Year		
net return				6.00 %											
initial amount bonus %				100,000 0.00 %					Subtotal of account	Manage Infl Factor	Manage Infl Factor				
w/bonus			Manage	100,000	Manage		Manage		incomes	minractor	IIII F dotor				
end of 1				111,000	(5,000)			L					end of 1		
end of 2				122,660	(5,000)								end of 2		
end of 3				135,020	(5,000)								end of 3		
end of 4				148,121	(5,000)								end of 4		
end of 5				162,008	(5,000)								end of 5		
end of 6				171,728	0								end of 6		
end of 7				182,032	0								end of 7		
end of 8				192,954	0								end of 8		
end of 9				204,531	0								end of 9		
end of 10				216,803	0								end of 10		
end of 11 end of 12				229,811 243,600	0								end of 11 end of 12		
end of 12				243,600	0								end of 12 end of 13		
end of 14				273,709	0								end of 14		
end of 15				290,131	0								end of 15		
end of 16				307,539	0								end of 16		
	-				(25,000)										
Orange ba	ckgrounds ind	icate hypothe	etical returns												
SIPS Retirement Planning System														PRIVACY P	OLICY TERMS OF USE
Planning Syster	15														

Step 23: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

														YOUR CASE LIST SE	TTINGS	HELP	SIGN OUT
														PF	REPARED BY		
															PLAN DATE		
CLIENT DASHBOA	RD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH	GRAPHS F	REPORTS 1	TOOLS			PLAN DATE		
Structu	urod Ir	noom		nina													
Edit Save Ca	ancel Add A	account Add	d Income A	dd Inc Tax 🛛 A	Add Target	dit or Add So	cenario Dis	play Options									
Scenario							~										
scenario							~										
- I																	
								1									
Planning 1 Horizon	l6 years ∨	-		-	IRA	-											
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Total Income	Year				
net return		4		6.00 %													
initial amount bonus				100,000 0.00 %					Subtotal of account	Manage Infl Factor	Manage Infl Factor						
w/bonu			Manage	100,000	Manage		Manage		incomes								
end of 1				111,000	(5,000)								end of 1				
end of 2				122,660	(5,000)								end of 2				
end of 3				135,020	(5,000)								end of 3				
end of 4 end of 5				148,121 162,008	(5,000) (5,000)								end of 4 end of 5				
end of 6				171,728	(5,000)								end of 6				
end of 7				182,032	0								end of 7				
end of 8				192,954	0								end of 8				
end of 9				204,531	0								end of 9				
end of 10				216,803	0								end of 10				
end of 11				229,811	0								end of 11				
end of 12				243,600	0								end of 12				
end of 13				258,216	0								end of 13				
end of 14				273,709	0								end of 14				
end of 15				290,131	0								end of 15				
end of 16				307,539	0								end of 16				
0.000					(25,000)												
Orange bac	ckgrounds ind	licate hypoth	etical returns														
SIDS															PRIVACY PO		ME OF US
SIPS Retirement Planning System															PRIVACT PC	ICT TER	MO OF US

Step 24: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

													PREPARED BY	
LIENT DASHBOARD	TRUCTURED INC	OME PLANNING	CASH FL	OW AND TAX A		ASSET ALLOCA	TION AND NET	WORTH	GRAPHS		OOLS		INITIAL PLAN DATE REVISED PLAN DATE	
								iserean a c		and a second of the			NETIOLD I ENTENTE	
Structured														
dit Save Cancel A	d Account A	d Income A	dd Inc Tax 🖌	Add Target	dit or Add So	enario Dis	play Options							
cenario														
enano						~								
	_		_				1							
anning 16 years prizon	<u> </u>			IRA	-									
Year	Account	Income	Account	Income	Account	Income	Accounts	Planned	Warne (2)	SS (2)	Total	Year		
net return			6.00 %				Total	Distribution	Wages (2)		Income			
nitial amount bonus %			100,000 0.00 %					Subtotal of account	Manage Infl Factor	Manage Infl Factor				
w/bonus		Manage	100,000	Manage		Manage		incomes	Init Factor	Infi Factor				
end of 1	-	manage	111,000	(5,000)	-	monage	1					end of 1		
end of 2			122,660	(5,000)								end of 2		
end of 3 end of 4			135,020 148,121	(5,000) (5,000)								end of 3 end of 4		
end of 5			140,121	(5,000)								end of 4 end of 5		
end of 6			171,728	(0,000)								end of 6		
end of 7			182,032	Ő								end of 7		
end of 8			192,954	0								end of 8		
end of 9			204,531	0								end of 9		
end of 10			216,803	0								end of 10		
end of 11			229,811	0								end of 11		
end of 12 end of 13			243,600 258,216	0								end of 12 end of 13		
end of 13 end of 14			258,216 273,709	0								end of 13 end of 14		
end of 15			290,131	0								end of 15		
end of 16			307.539	0								end of 16		
				(25,000)										
	S 100 000 0	hetical returns												

Step 25: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.

														YOUR CASE LIST SETTI	NGS HELP	SIGN OUT
														PREPA	ARED BY:	
														INITIAL PLA	N DATE:	
CLIENT DASHBOA	ARD STRU	CTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSET ALLOCA	TION AND NET	WORTH	GRAPHS I	REPORTS	TOOLS		REVISED PLA	N DATE:	
Structu	ired Ir	ncom	e Plar	nina												
Edit Dynamic		COIII	e i iui	innig												
	Mode															
Scinario							~									
Planning 1								1								
Horizo	16 years ∨															
Year		Account	Income	Account	Income	Account	Income	Accounts	Planned	Beth	Beth SS (2)	Total	Year			
net re urn	-							Total	Distribution	Wages (2)		Income				
initial an ount									Subtotal	1.0.5.	Infl Factor					
bonus 6 w/bonus									of account incomes	Inti Factor	I Inti Factor					
end of				-		-		-		-			end of 1			
end of 2 end of 3													end of 2 end of 3			
end of 4													end of 4			
end of 5 end of 6													end of 5 end of 6			
end of 7													end of 7			
end of 8													end of 8			
end of 9 end of 10													end of 9 end of 10			
end of 11													end of 11			
end of 12													end of 12			
end of 13													end of 13 end of 14			
end of 14 end of 15													end of 14 end of 15			
end of 16													end of 16			
Orange bac	- kgrounds ind	licate hypothe	etical returns	1									-			
SIPS														PRI	VACY POLICY	TERMS OF USE
Retirement Planning System																

Step 26: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

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:		
Struct Edit Dynami	ured li	ncom	e Plar	nning												
	16 years →						~	1								
lorizon Year		Account	Income	Account	Income	Account	Income	Accounts	Planned	(0)	SS (2)	Total	Year			
net return initial amount bonus % w/bonus								Total	Subtotal of account incomes	Wages (2) Infl Factor		Income				
end of 1 end of 2 end of 3 end of 4									moornes				end of 1 end of 2 end of 3 end of 4			
end of 4 end of 5 end of 6 end of 7													end of 4 end of 5 end of 6 end of 7			
end of 8 end of 9 end of 10													end of 8 end of 9 end of 10 end of 11			
end of 11 end of 12 end of 13 end of 14													end of 12 end of 13 end of 14			
end of 15 end of 16	ł									-			end of 15 end of 16			

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.