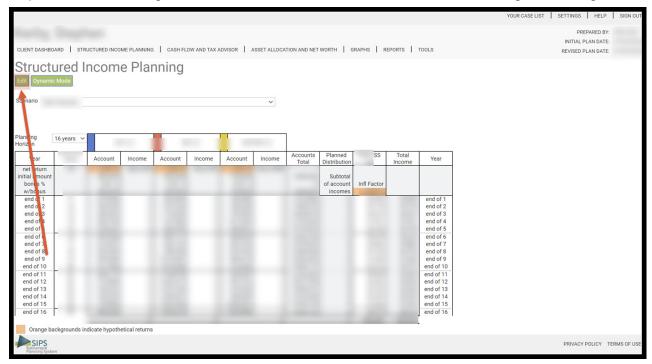
Calculated Plan Withdrawals: Makeup total owners RMD from one account

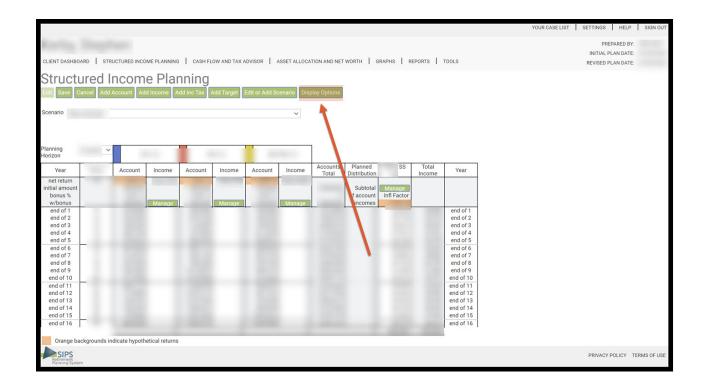
10/07/2024 1:02 pm EDT

On the structured income planning page, you have the ability to view the RMD amounts and withdrawal the amounts needed for the RMD. Under the Manage Accounts page you have the option to choose the total RMD withdrawals from one account. Below is a step-by-step guide for the Make-up total owners RMD from one account function.

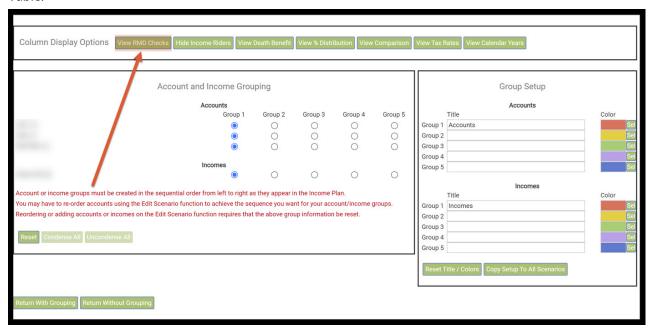
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



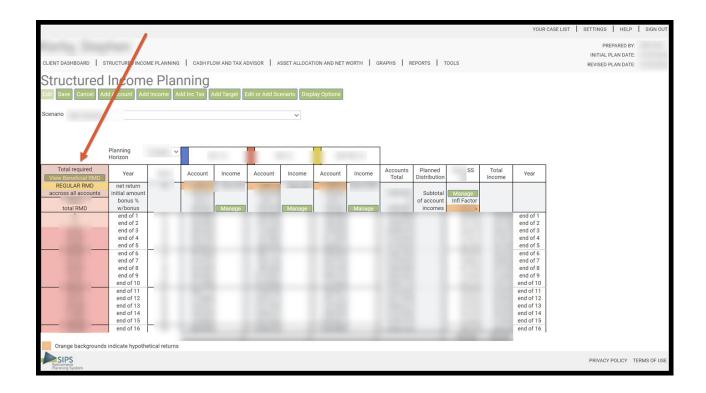
Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.



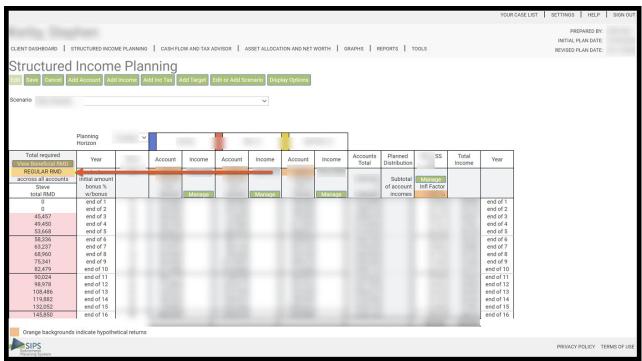
Step 3: View RMD Checks: Click on the green View RMD Checks button in the Column Display Options Table.



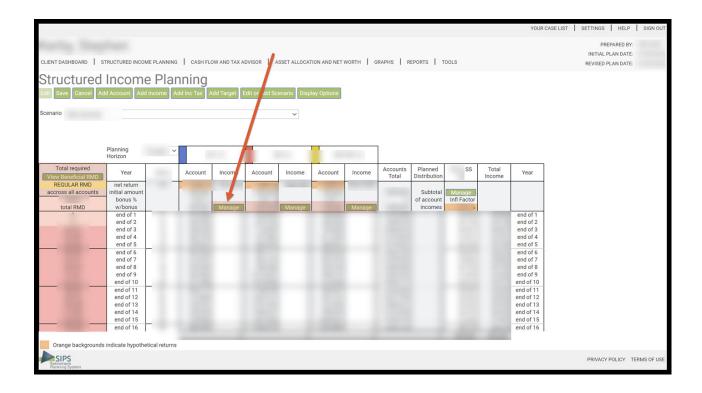
Step 4: Structured Income Planning Page: A new column on the left will appear that will display the monetary amounts for the RMD.



Step 5:RMD Option: Whichever title is in the Yellow box is the RMD that is displayed. If you need to change the RMD, click on the green button above the Yellow box.

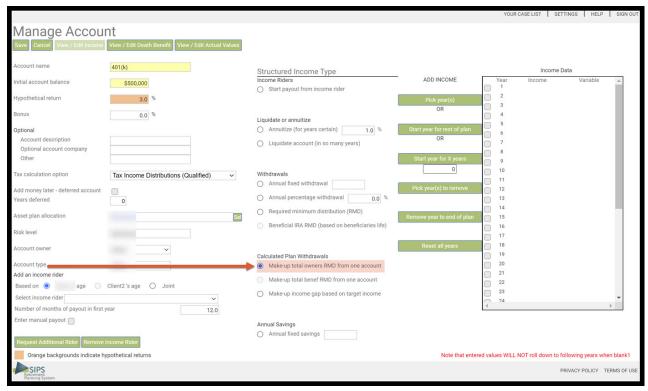


Step 6: Manage: Click on the green Manage button that is located in the incomes column for whichever account you would like to do the total RMD withdrawal from.

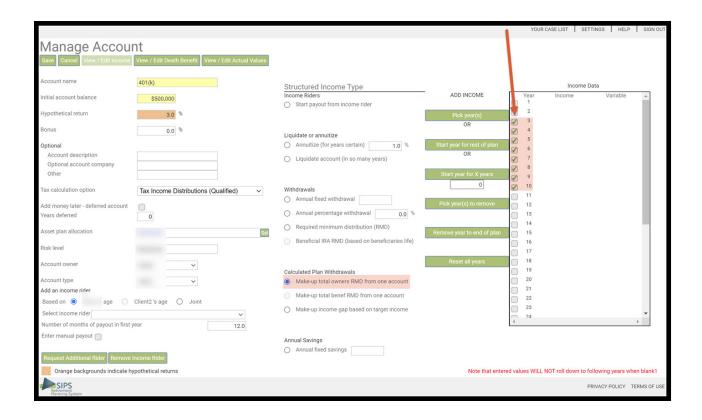


Option A: Pick Years:

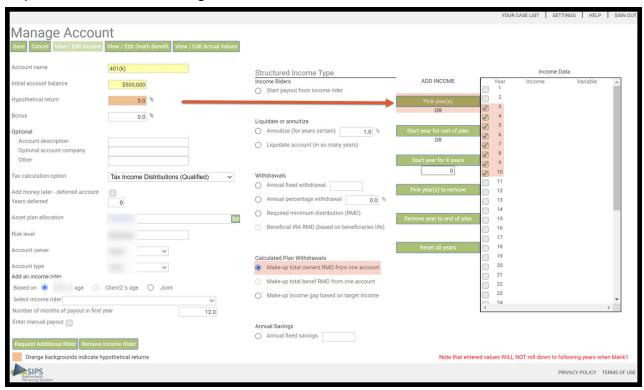
Step 7: Withdrawals: Under the Structured Income Type Calculate Plan Withdrawals section, click on the radio button next to the Make-up total owners RMD from one account.



Step 8: Income Data: In the Income Data box click on the numerical year(s) that you would like the monetary addition to be added to.



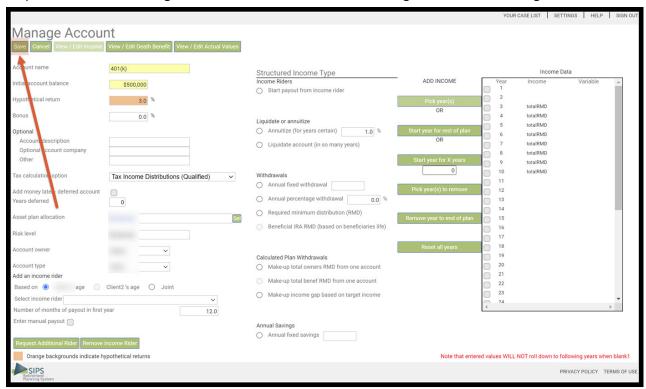
Step 9: Add Income: Click on the green Pick Years button.



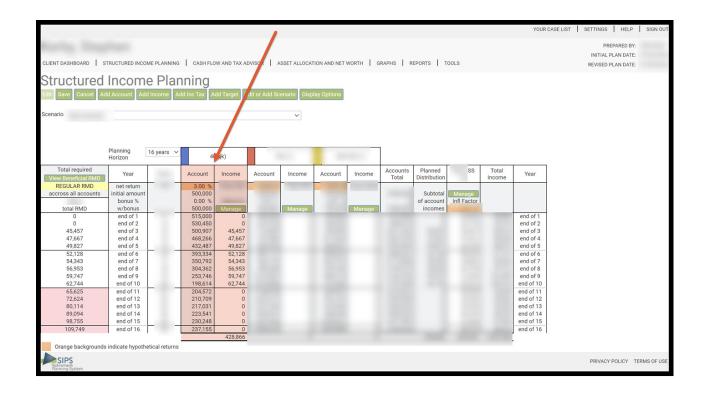
Step 10: Clicking: The phrase total RMD should move into the Income Column of the Income Data Table.

				YOUR CASE LIST	SETTINGS HELP	SIGN OUT					
Manage Account											
	View / Edit Death Benefit View / Edit Actual Values			\							
Account name	401(k)	Structured Income Type		In	come Data						
Initial account balance	\$500,000	Income Riders Start payout from income rider	ADD INCOME	Year Income	e Variable	^					
Hypothetical return	3.0 %		Pick year(s)	2 3 totalRMI	D						
Bonus	0.0 %	Liquidate or annuitize	0	4 totalRMi 5 totalRMi							
Optional Account description Optional account company Other		Annuitize (for years certain) 1.0 % Liquidate account (in so many years)	Start year for rest of plan OR Start year for X years	6 totalRMi 7 totalRMi 8 totalRMi 9 totalRMi	D D						
Tax calculation option Add money later - deferred account Years deferred	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal Annual percentage withdrawal 0.0 %	0 Pick year(s) to remove	10 totalRMI 11 12 13							
Asset plan allocation	Sel	Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	14 15							
Risk level		Denenicial IKA RIMD (based on beneficiaries life)		16 17							
Account owner	~	Calculated Plan Withdrawals	Reset all years	18 19							
Account type Add an income rider	~	Make-up total owners RMD from one account		20							
Based on age Client2 's age Joint		Make-up total benef RMD from one account Make-up income gap based on target income		22 23							
Select income rider Number of months of payout in first y	227	wake-up income gap based on target income		24		*					
Enter manual payout Request Additional Rider Remove I	.2.0	Annual Savings Annual fixed savings									
Orange backgrounds indicate hypothetical returns Note that entered values WILL NOT roll down to following years when blank1											
PRIVACY POLICY TERMS OF USE PRIVACY POLICY TERMS OF USE PRIVACY POLICY TERMS OF USE											

Step 11: Save: Click on the green Save button underneath the Manage Account subheading.

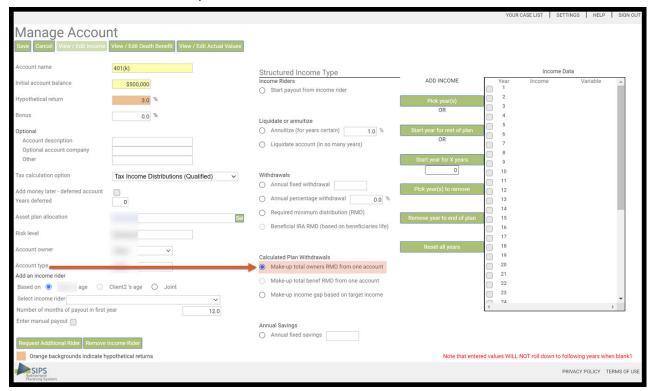


Step 12: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made into the plan.

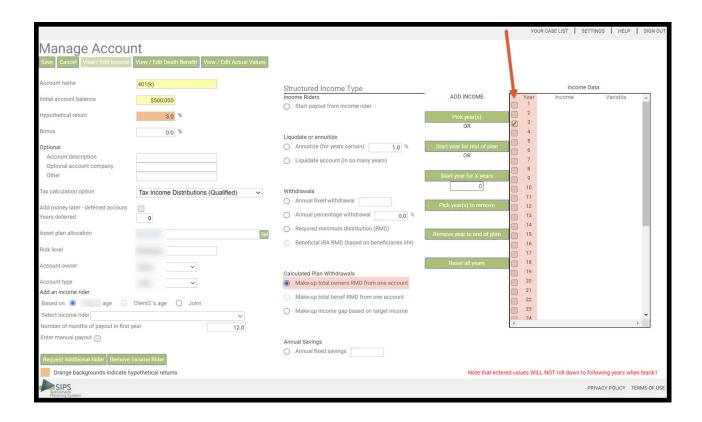


Option B: Start Years for the Rest of the Plan:

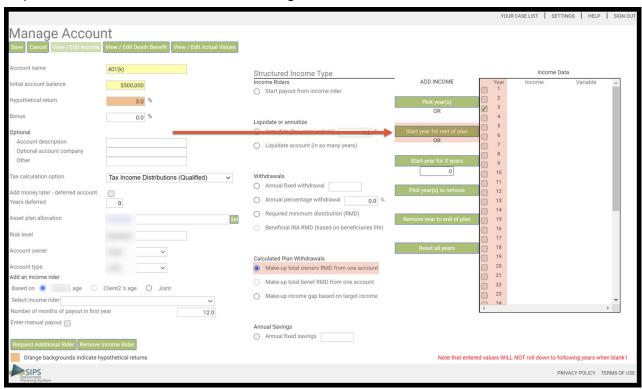
Step 13: Withdrawals: Under the Structured Income Type Calculate Plan Withdrawals section, click on the radio button next to the Make-up total owners RMD from one account.



Step 14: Year: In the Income data table select which year you would like to start the years for the rest of the plan.



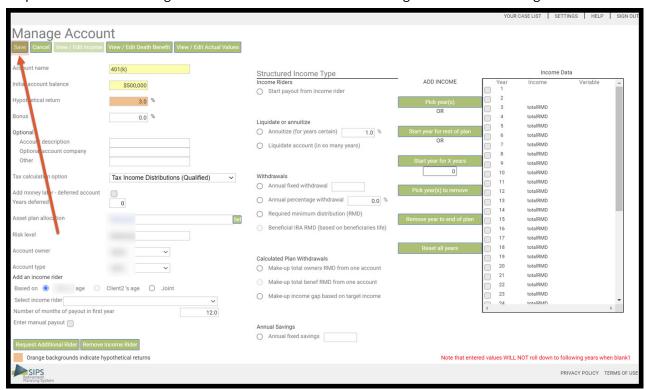
Step 15: Start Year for Rest of Plan: Click on the green button Start Year for Rest of Plan.



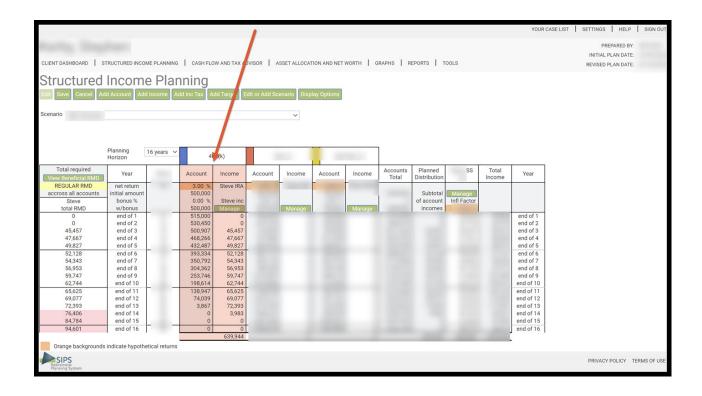
Step 16: Clicking: The phrase total RMD should move into the Income Column of the Income Data Table.

				1	YOUR CASE LIST	SETTINGS HELP	SIGN OU
Manage Accoun	ı†			-\			
	View / Edit Death Benefit View / Edit Actual Values	l		- 1			
					\		
Account name	401(k)	Structured Income Type			Incor	ne Data	
Initial account balance	\$500,000	Income Riders	ADD INCOME	Ye	ar Income	Variable	
	3300,000	Start payout from income rider		1			
Hypothetical return	3.0 %		Pick year(s)	3			
Bonus	0.0 %	Liquidate or annuitize	OR	0 4	totalRMD		
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan	0 5			
Account description			OR		totalRMD totalRMD		
Optional account company		Liquidate account (in so many years)			totalRMD		
Other			Start year for X years	9	totalRMD		
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	1I			
		Annual fixed withdrawal	Pick year(s) to remove	1 1			
Add money later - deferred account Years deferred		O Annual percentage withdrawal 0.0 %	rick jear(s) to terriore	1:			
rears deferred	0	Required minimum distribution (RMD)		1	4 totalRMD		
Asset plan allocation	Se		Remove year to end of plan	1			
Risk level		Beneficial IRA RMD (based on beneficiaries life)		D 1			
			Reset all years	0 1			
Account owner	~	Calculated Plan Withdrawals	Reset all years	0 1			
Account type	~	Make-up total owners RMD from one account		2	0 totalRMD		
Add an income rider		Make-up total benef RMD from one account		2			
Based on age Client2 's age Joint				2:			
Select income rider	~	Make-up income gap based on target income		2			~
Number of months of payout in first ye	ear 12.0			4			
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove In	come Rider						
Orange backgrounds indicate hyp	pothetical returns		Note that entere	ed values	WILL NOT roll down	to following years w	hen blank1
SIPS Retirement Planning System						PRIVACY POLICY	TERMS OF USE

Step 17: Save: Click on the green Save button underneath the Manage Account subheading.

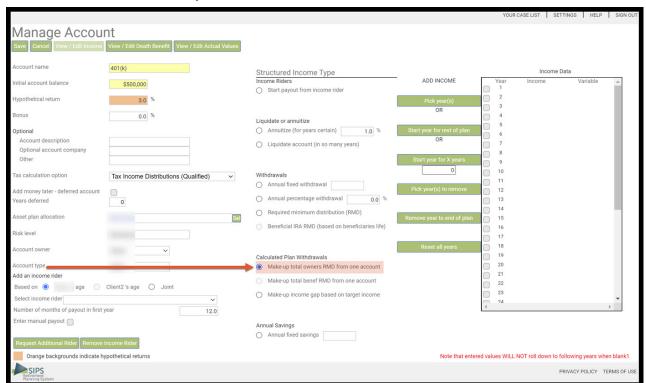


Step 18: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made into the plan.

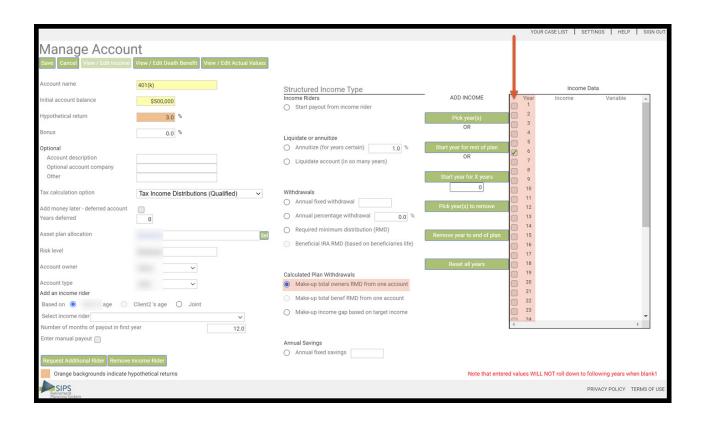


Option C: Start Years for X Years:

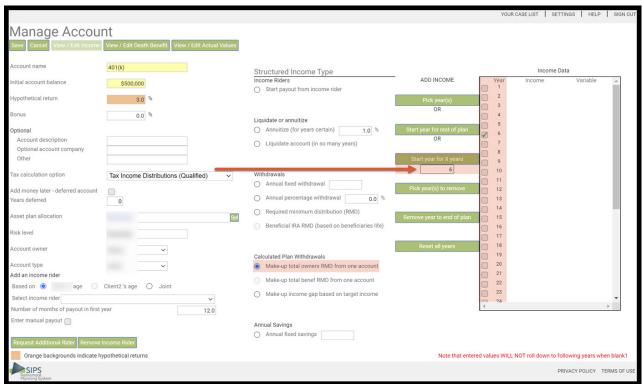
Step 19: Withdrawals: Under the Structured Income Type Calculate Plan Withdrawals section, click on the radio button next to the Make-up total owners RMD from one account.



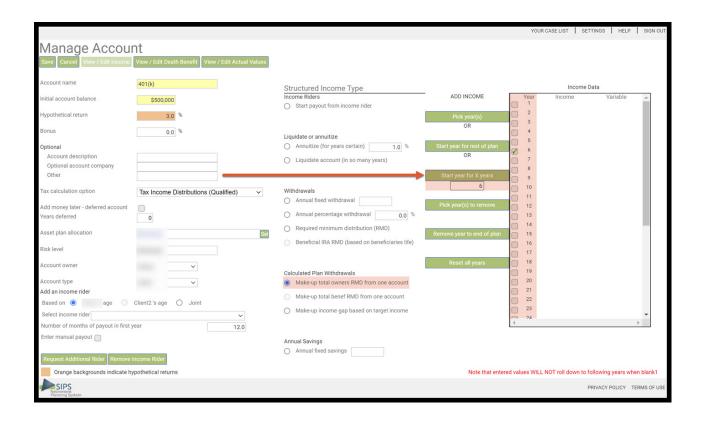
Step 20: Year: In the Income data table select which year you would like to start the monetary addition.



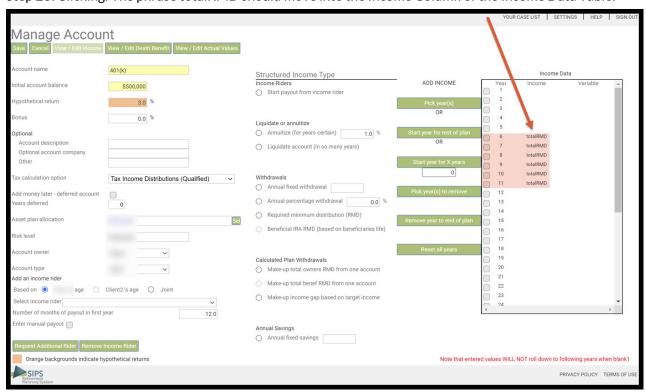
Step 21: Start Year for X Years Text Box: Within the text box for Start Year fox X Years, type in the how many years you would like the monetary amount to be distributed.



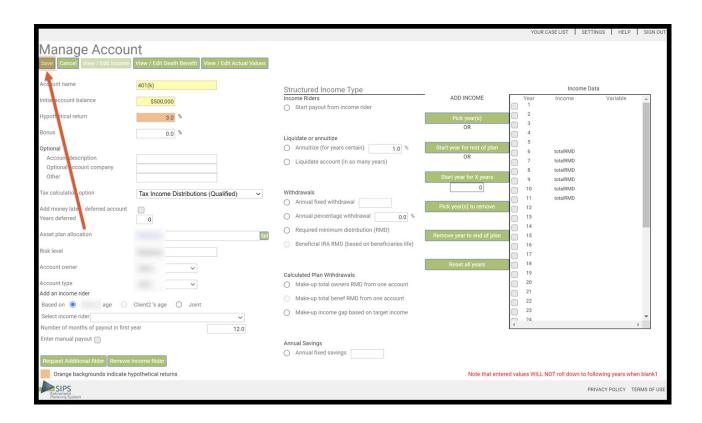
Step 22: Start Years for X Years: Click on the green button Start Years for X Years.



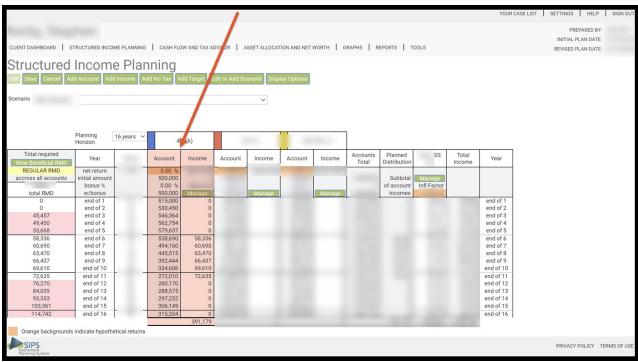
Step 23: Clicking: The phrase total RMD should move into the Income Column of the Income Data Table.



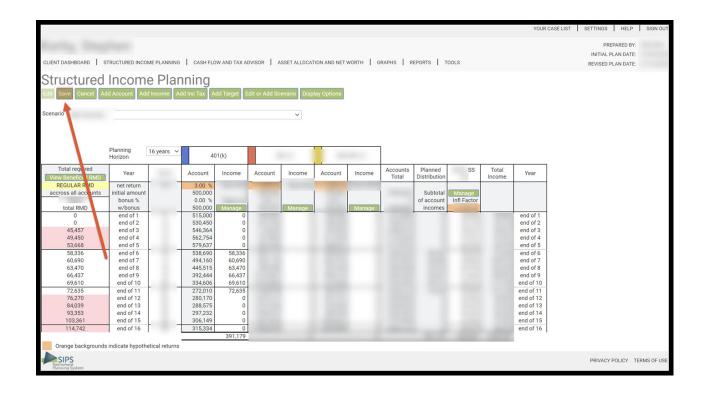
Step 24: Save: Once done click on the green Save button underneath the Manage Account subheading.



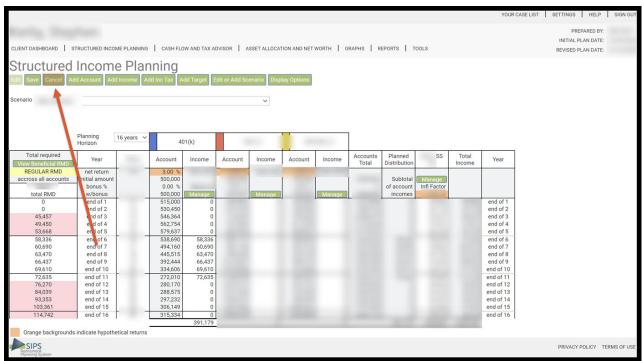
Step 25: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made into the plan.



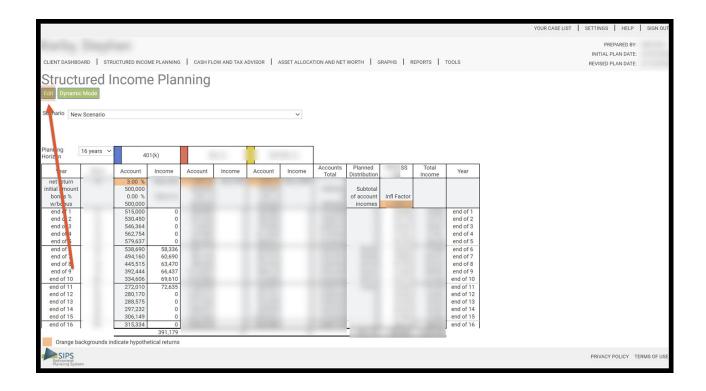
Step 26: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



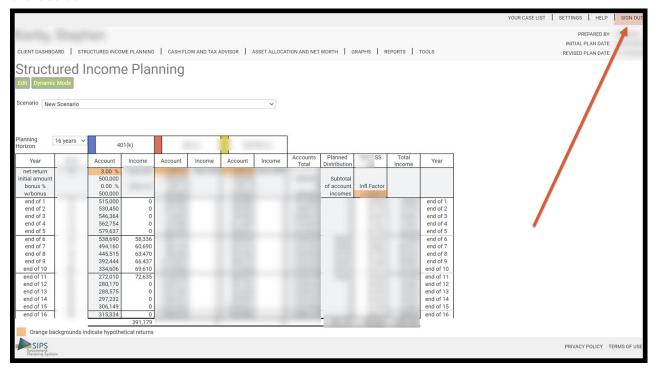
Step 27: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 28: 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.



Step 29: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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.