

Viewing Calendar Years instead of Plan Years

01/12/2026 11:19 am EST

Within the Display Options within the structured income planning page, you can edit the structured income plan to show the calendar years instead of the plan years. Below is a step-by-step guide for viewing the calendar years.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

Structured Income Planning

Edit | Dynamic Mode

Scenario: New Scenario

Planning Horizon: 20 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus %											
w/bo us											
end of 1											end of 1
end of 2											end of 2
end of 3											end of 3
end of 4											end of 4
end of 5											end of 5
end of 6											end of 6
end of 7											end of 7
end of 8											end of 8
end of 9											end of 9
end of 10											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 15
end of 16											end of 16
end of 17											end of 17
end of 18											end of 18
end of 19											end of 19
end of 20											end of 20

Orange backgrounds indicate hypothetical returns

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

YOUR CASE LIST

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HELP

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CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

GRAPHS

REPORTS

TOOLS

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

Scenario: New Scenario

Planning Horizon

20 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
end of 1											end of 1
end of 2											end of 2
end of 3											end of 3
end of 4											end of 4
end of 5											end of 5
end of 6											end of 6
end of 7											end of 7
end of 8											end of 8
end of 9											end of 9
end of 10											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 15
end of 16											end of 16
end of 17											end of 17
end of 18											end of 18
end of 19											end of 19
end of 20											end of 20

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Step 3: View Calendar Years: Click on the green View Calendar Years button in the Column Display Options Table.

Column Display Options

View RMD Checks

Hide Income Riders

View Death Benefit

View % Distribution

View Comparison

View Tax Rates

View Calendar Years

Account and Income Grouping

Accounts

Group 1

Group 2

Group 3

Group 4

Group 5

401k (1)

IRA (1)

Beneficial IRA

SS (2)

Incomes

Account or income groups must be created in the sequential order from left to right as they appear in the Income Plan.

You may have to re-order accounts using the Edit Scenario function to achieve the sequence you want for your account/income groups.

Reordering or adding accounts or incomes on the Edit Scenario function requires that the above group information be reset.

Reset

Condense All

Uncondense All

Group Setup

Accounts

Title

Group 1

Group 2

Group 3

Group 4

Group 5

Color

Set

Set

Set

Set

Set

Incomes

Title

Group 1

Group 2

Group 3

Group 4

Group 5

Color

Set

Set

Set

Set

Set

Reset Title / Colors

Copy Setup To All Scenarios

Return With Grouping

Return Without Grouping

Step 4: Structured Income Planning Page: The Year columns will change to the calendar years.

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Structured Income Planning

[Edit](#)
[Save](#)
[Cancel](#)
[Add Account](#)
[Add Income](#)
[Add Inc Tax](#)
[Add Target](#)
[Edit or Add Scenario](#)
[Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
2024											2024
2025											2025
2026											2026
2027											2027
2028											2028
2029											2029
2030											2030
2031											2031
2032											2032
2033											2033
2034											2034
2035											2035
2036											2036
2037											2037
2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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Step 5: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

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[Edit](#)
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[Cancel](#)
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Scenario:

Planning Horizon:

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2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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Step 6: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.

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PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario:

Planning Horizon: 20 years

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2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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Step 7: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon: 20 years

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2043											2043

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Step 8: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

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Structured Income Planning


Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario: New Scenario

Planning Horizon: 20 years

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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.