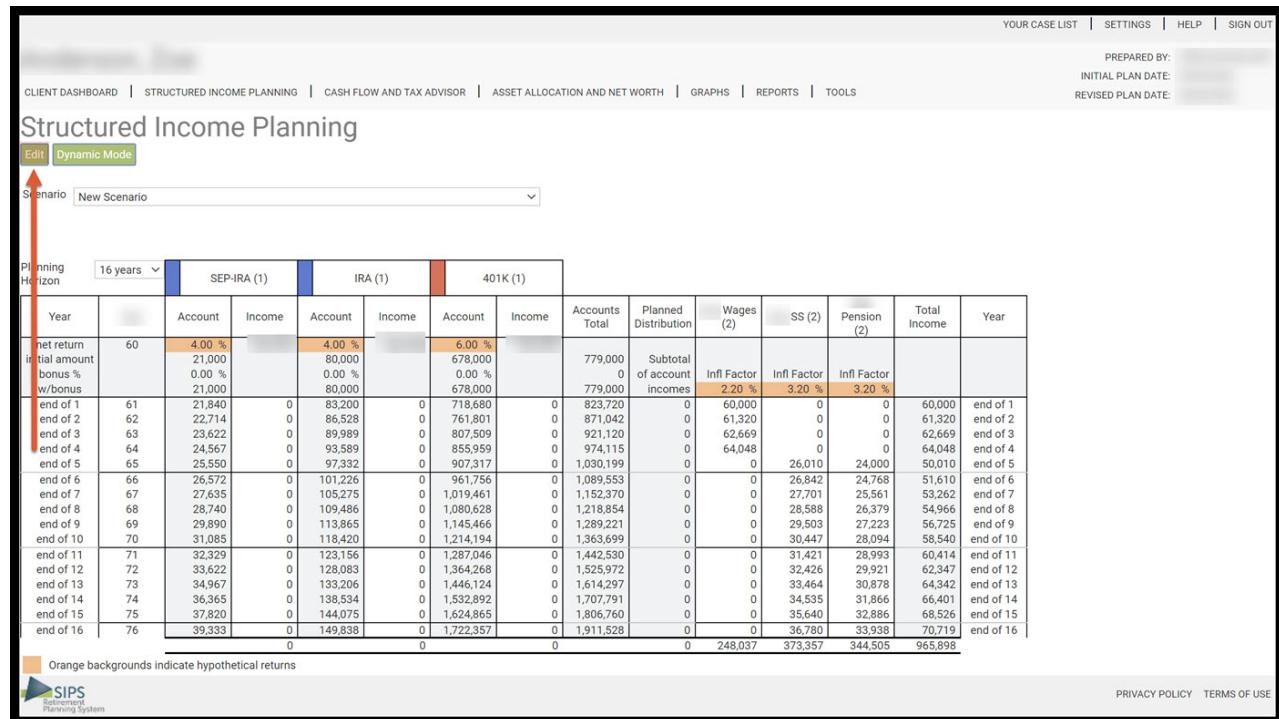


Account and Income Groups and Group Setup

01/12/2026 11:15 am EST

Within the Display Options within the structured income planning page, you can edit account and incomes into different groups. Below is a step-by-step guide for editing the account and incomes groups.

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



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'. On the right, there are buttons for 'PREPARED BY', 'INITIAL PLAN DATE', and 'REVISED PLAN DATE'. Below the header, the sub-heading 'Structured Income Planning' is displayed with 'Edit' and 'Dynamic Mode' buttons. An orange arrow points to the 'Edit' button. The main content is a table showing a 16-year planning horizon for three accounts: SEP-IRA (1), IRA (1), and 401K (1). The table includes columns for Year, Account, Income, and various financial metrics like Accounts Total, Planned Distribution, and Infl Factor. Orange backgrounds are used for certain cells to indicate hypothetical returns. At the bottom of the table, a note says 'Orange backgrounds indicate hypothetical returns'. The SIPS logo is at the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' are at the bottom right.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

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 16 years

SEP-IRA (1)			IRA (1)			401K (1)							
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return	60	4.00 %	21,000	4.00 %	80,000	6.00 %	779,000	Subtotal of account incomes	Manage 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
initial amount			0.00 %	0.00 %	678,000	0.00 %	779,000						
bonus % w/bonus	21,000				80,000								
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	62,669	end of 3
end of 4	64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	51,610
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	25,561	53,262
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	26,379	54,966
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	27,223	56,725
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	28,094	58,540
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	28,993	60,414
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	29,921	62,347
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	30,878	64,342
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	31,866	66,401
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	32,886	68,526
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	33,938	70,719
		0	0	0	0	0	248,037	373,357	344,505	965,898			

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 3: Group Setup Accounts: Under the Title section delete default name and type in whichever titles you would like to use.

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
<input checked="" type="radio"/> SEP-IRA (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/> IRA (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/> 401K (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

Wages (2)	SS (2)	Pension (2)
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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 Accounts
Group 2
Group 3
Group 4
Group 5

Incomes

Title
Group 1 Incomes
Group 2
Group 3
Group 4
Group 5

Color

<input checked="" type="radio"/> Sel
<input type="radio"/> Sel
<input type="radio"/> Sel
<input type="radio"/> Sel
<input type="radio"/> Sel

Color

<input checked="" type="radio"/> Sel
<input type="radio"/> Sel
<input type="radio"/> Sel
<input type="radio"/> Sel
<input type="radio"/> Sel

Reset Title / Colors | Copy Setup To All Scenarios

Return With Grouping | Return Without Grouping

Step 4: Color Selection Accounts: Click on the green Sel button next to the color of the title to select which color you would like the group title to be.

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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1 Accounts	<input checked="" type="radio"/> Sel
Group 2	<input type="radio"/> Sel
Group 3	<input type="radio"/> Sel
Group 4	<input type="radio"/> Sel
Group 5	<input type="radio"/> Sel

Incomes	
Title	Color
Group 1 Incomes	<input checked="" type="radio"/> Sel
Group 2	<input type="radio"/> Sel
Group 3	<input type="radio"/> Sel
Group 4	<input type="radio"/> Sel
Group 5	<input type="radio"/> Sel

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 5: Group Setup Incomes: Under the Title section delete default name and type in whichever title you would like to use.

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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1 Accounts	<input checked="" type="radio"/> Sel
Group 2	<input type="radio"/> Sel
Group 3	<input type="radio"/> Sel
Group 4	<input type="radio"/> Sel
Group 5	<input type="radio"/> Sel

Incomes	
Title	Color
Group 1 Incomes	<input checked="" type="radio"/> Sel
Group 2	<input type="radio"/> Sel
Group 3	<input type="radio"/> Sel
Group 4	<input type="radio"/> Sel
Group 5	<input type="radio"/> Sel

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 6: Color Selection Incomes: Click on the green Sel button next to the color of the title to select which color you would like the group title to be.

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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1	Accounts
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

Incomes	
Title	Color
Group 1	Incomes
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 7: Reset Title/Colors: To reset the titles and colors click on the green Reset Title/Colors box located in the lower lefthand side of the 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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1	Accounts
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

Incomes	
Title	Color
Group 1	Incomes
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 8: Copy Setup to All Scenarios: To replicate the group setup to all scenarios, click on the green Copy Setup to All Scenarios button located on the righthand side of the 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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1 Accounts	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

Incomes	
Title	Color
Group 1 Incomes	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 9: Account and Income Grouping Accounts: Click on the radio button for which group you would like the accounts to be under.

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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1 Accounts	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

Incomes	
Title	Color
Group 1 Incomes	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 10: Account and Income Grouping Incomes: Click on the radio button for which group you would like the incomes to be under.

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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1	Accounts
Group 2	<input type="checkbox"/> Sel
Group 3	<input type="checkbox"/> Sel
Group 4	<input type="checkbox"/> Sel
Group 5	<input type="checkbox"/> Sel

Incomes	
Title	Color
Group 1	Incomes
Group 2	<input type="checkbox"/> Sel
Group 3	<input type="checkbox"/> Sel
Group 4	<input type="checkbox"/> Sel
Group 5	<input type="checkbox"/> Sel

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 11: Reset: To reset the Account and Income Group, click on the green reset button located in the lefthand side of the box. The radio buttons will go back to the default setting.

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
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Color
Group 1	Accounts
Group 2	<input type="checkbox"/> Sel
Group 3	<input type="checkbox"/> Sel
Group 4	<input type="checkbox"/> Sel
Group 5	<input type="checkbox"/> Sel

Incomes	
Title	Color
Group 1	Incomes
Group 2	<input type="checkbox"/> Sel
Group 3	<input type="checkbox"/> Sel
Group 4	<input type="checkbox"/> Sel
Group 5	<input type="checkbox"/> Sel

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 12: Return with Grouping: Click on the green Return with Group button to return back to the Structured Income Plan.

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
SEP-IRA (1)		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
		Incomes				
Wages (2)		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Account and 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](#)

[Return With Grouping](#) [Return Without Grouping](#)

Group Setup

Accounts	
Title	Color
Group 1 Accounts	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

Incomes	
Title	Color
Group 1 Incomes	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

Step 13: Structured Income Planning Page: New title row should appear on the structured income planning page along with the color that you have selected.

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

Scenario: New Scenario

Accounts										Incomes							
Planning Horizon	16 years	SEP-IRA (1)		IRA (1)		401K (1)				Accounts Total		Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
Year		Account	Income	Account	Income	Account	Income										
net return	60	4.00 %		4.00 %		6.00 %				779,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor			
initial amount		21,000		80,000		678,000				0		2.20 %	3.20 %	3.20 %			
bonus % w/bonus		0.00 %		0.00 %		0.00 %				779,000							
		21,000		80,000		678,000											
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	0	0	60,000	end of 1	
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	0	0	61,320	end of 2	
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	0	0	62,669	end of 3	
end of 4	64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	0	0	64,048	end of 4	
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	0	0	50,010	end of 5	
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	0	0	51,610	end of 6	
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	25,561	0	0	53,262	end of 7	
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	26,379	0	0	54,966	end of 8	
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	27,223	0	0	56,725	end of 9	
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	28,094	0	0	58,540	end of 10	
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	28,993	0	0	60,414	end of 11	
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	29,921	0	0	62,347	end of 12	
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	30,878	0	0	64,342	end of 13	
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	31,866	0	0	66,401	end of 14	
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	32,886	0	0	68,526	end of 15	
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	33,938	0	0	70,719	end of 16	
										0	248,037	373,357	344,505	965,898			

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

PRIVACY POLICY | TERMS OF USE

Step 14: Compressing the Groupings: To group all the columns together and get the total monetary amount, click on the diagonal carrot arrow located in the upper lefthand side of the row title.

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

Scenario: New Scenario

Planning Horizon: 16 years

Accounts

Year	Account	Income		Account	Income		Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
		Income	Income		Income	Income							
net return	60	4.00 %		21,000	80,000	678,000	779,000	Subtotal of account incomes	2.20 %	3.20 %	3.20 %		
initial amount				0.00 %	0.00 %	0.00 %	0						
bonus % w/bonus				21,000	80,000	678,000	779,000						
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000 end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320 end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669 end of 3
end of 4	64	24,567	0	93,589	0	859,959	0	974,115	0	64,048	0	0	64,048 end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	26,010	0	24,000	50,010 end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	0	51,610 end of 6
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	0	25,561 end of 7
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	0	54,966 end of 8
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	0	27,223 end of 9
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	0	58,540 end of 10
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	0	28,993 end of 11
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	0	29,921 end of 12
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	0	30,878 end of 13
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	0	31,866 end of 14
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	0	32,886 end of 15
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	0	33,938 end of 16
				0	0	0	0	0	0	248,037	0	373,357	344,505 965,898

Orange backgrounds indicate hypothetical returns

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Step 15: Structured Income Planning Page: The accounts column should be combined into one showing the total monetary amounts. The incomes columns should be combined into one showing the total monetary amounts.

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

Scenario: New Scenario

Planning Horizon: 16 years

Accounts

Year	Account	Income		Account	Income		Accounts Total	Planned Distribution	Grouped	Total Income	Year
		Income	Income		Income	Income					
net return	60	779,000	Grouped	779,000	Subtotal of account incomes	779,000					
initial amount				0		0					
bonus % w/bonus				779,000		779,000					
end of 1	61	823,720	0	823,720	0	60,000	60,000	0	60,414	0	end of 1
end of 2	62	871,042	0	871,042	0	61,320	61,320	0	61,320	0	end of 2
end of 3	63	921,120	0	921,120	0	62,669	62,669	0	62,669	0	end of 3
end of 4	64	974,115	0	974,115	0	64,048	64,048	0	64,048	0	end of 4
end of 5	65	1,030,199	0	1,030,199	0	50,010	50,010	0	50,010	0	end of 5
end of 6	66	1,089,553	0	1,089,553	0	51,610	51,610	0	51,610	0	end of 6
end of 7	67	1,152,370	0	1,152,370	0	53,262	53,262	0	53,262	0	end of 7
end of 8	68	1,218,854	0	1,218,854	0	54,966	54,966	0	54,966	0	end of 8
end of 9	69	1,289,221	0	1,289,221	0	56,725	56,725	0	56,725	0	end of 9
end of 10	70	1,363,699	0	1,363,699	0	58,540	58,540	0	58,540	0	end of 10
end of 11	71	1,442,530	0	1,442,530	0	60,414	60,414	0	60,414	0	end of 11
end of 12	72	1,525,972	0	1,525,972	0	62,347	62,347	0	62,347	0	end of 12
end of 13	73	1,614,297	0	1,614,297	0	64,342	64,342	0	64,342	0	end of 13
end of 14	74	1,707,791	0	1,707,791	0	66,401	66,401	0	66,401	0	end of 14
end of 15	75	1,806,760	0	1,806,760	0	68,526	68,526	0	68,526	0	end of 15
end of 16	76	1,911,528	0	1,911,528	0	70,719	70,719	0	70,719	0	end of 16
		0	0	965,898	0	965,898	0	0	965,898	0	

Orange backgrounds indicate hypothetical returns

Privacy Policy Terms of Use

Step 16: Decompressing the Groupings: Double click on the diagonal carrot arrow located in the upper righthand row for the accounts and incomes. This will decompress the grouping.

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

Scenario | New Scenario

Planning Horizon 16 years

Year	Accounts		Incomes		Planned Distribution	Grouped	Total Income	Year
	Account	Income	Accounts Total	Planned Distribution				
net return	60	779,000	Grouped	779,000	Subtotal of account incomes			
initial amount		779,000	Grouped	779,000				
bonus % w/bonus								
end of 1	61	823,720	0	823,720	0	60,000	60,000	end of 1
end of 2	62	871,042	0	871,042	0	61,320	61,320	end of 2
end of 3	63	921,120	0	921,120	0	62,669	62,669	end of 3
end of 4	64	974,115	0	974,115	0	64,048	64,048	end of 4
end of 5	65	1,030,199	0	1,030,199	0	50,010	50,010	end of 5
end of 6	66	1,089,553	0	1,089,553	0	51,610	51,610	end of 6
end of 7	67	1,152,370	0	1,152,370	0	53,262	53,262	end of 7
end of 8	68	1,218,854	0	1,218,854	0	54,966	54,966	end of 8
end of 9	69	1,289,220	0	1,289,221	0	56,725	56,725	end of 9
end of 10	70	1,363,699	0	1,363,699	0	58,540	58,540	end of 10
end of 11	71	1,442,530	0	1,442,530	0	60,414	60,414	end of 11
end of 12	72	1,525,972	0	1,525,972	0	62,347	62,347	end of 12
end of 13	73	1,614,297	0	1,614,297	0	64,342	64,342	end of 13
end of 14	74	1,707,791	0	1,707,791	0	66,401	66,401	end of 14
end of 15	75	1,806,760	0	1,806,760	0	68,526	68,526	end of 15
end of 16	76	1,911,528	0	1,911,528	0	70,719	70,719	end of 16
					0	965,898	965,898	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 17: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

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

Scenario | New Scenario

Planning Horizon 16 years

Year	Accounts				Incomes				Planned Distribution	Grouped	Total Income	Year
	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)				
net return	60	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA					
initial amount		21,000		80,000		678,000						
bonus % w/bonus		21,000	Manage	80,000	Manage	678,000	Manage					
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	62,669	end of 3
end of 4	64	24,567	0	93,589	0	859,595	0	974,115	0	64,048	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	26,010	24,000	end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	26,842	24,768	end of 6
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	27,701	25,561	end of 7
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	28,588	26,379	end of 8
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	29,503	27,223	end of 9
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	30,447	28,094	end of 10
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	31,421	28,993	end of 11
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	32,426	29,921	end of 12
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	33,464	30,878	end of 13
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	34,535	31,866	end of 14
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	35,640	32,886	end of 15
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	36,780	33,938	end of 16
					0	0	0	0	248,037	373,357	344,505	965,898

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 18: 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.

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](#) [Dynamic Mode](#)

Scenario: New Scenario

Planning Horizon: 16 years

Accounts									Incomes				
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return initial amount bonus % w/bonus	60 21,000 0.00 % 21,000	4.00 % 80,000 0.00 % 80,000	IRA 80,000 0.00 % 80,000	IRA 678,000 0.00 % 678,000	IRA 779,000 0 779,000	Subtotal of account incomes 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %					
end of 1	61 22,714	0 86,528	0 761,801	0 871,042	0 61,320	0 0	60,000 61,320	0 0	0 0	0 0	0 0	60,000 61,320	end of 1 end of 2
end of 3	63 23,622	0 89,989	0 807,509	0 921,120	0 0	0 0	62,669 64,048	0 0	0 0	0 0	0 0	62,669 64,048	end of 3 end of 4
end of 5	65 25,550	0 97,332	0 907,317	0 1,030,199	0 0	0 0	26,010 24,000	0 0	0 0	0 0	0 0	50,010 50,010	end of 5
end of 6	66 26,572	0 101,226	0 961,756	0 1,089,553	0 0	0 0	26,842 24,768	0 0	0 0	0 0	0 0	51,610 51,610	end of 6
end of 7	67 27,635	0 105,275	0 1,019,461	0 1,152,370	0 0	0 0	27,701 25,561	0 0	0 0	0 0	0 0	53,262 53,262	end of 7
end of 8	68 28,740	0 109,486	0 1,080,628	0 1,218,854	0 0	0 0	28,588 26,379	0 0	0 0	0 0	0 0	54,966 54,966	end of 8
end of 9	69 29,890	0 113,865	0 1,145,466	0 1,289,221	0 0	0 0	29,503 27,223	0 0	0 0	0 0	0 0	56,725 56,725	end of 9
end of 10	70 31,085	0 118,420	0 1,214,194	0 1,363,699	0 0	0 0	30,447 28,094	0 0	0 0	0 0	0 0	58,540 58,540	end of 10
end of 11	71 32,329	0 123,156	0 1,287,046	0 1,442,530	0 0	0 0	31,421 28,993	0 0	0 0	0 0	0 0	60,414 60,414	end of 11
end of 12	72 33,622	0 128,083	0 1,364,268	0 1,525,972	0 0	0 0	32,426 29,921	0 0	0 0	0 0	0 0	62,347 62,347	end of 12
end of 13	73 34,967	0 133,206	0 1,446,124	0 1,614,297	0 0	0 0	33,464 30,878	0 0	0 0	0 0	0 0	64,342 64,342	end of 13
end of 14	74 36,365	0 138,534	0 1,532,892	0 1,707,791	0 0	0 0	34,535 31,866	0 0	0 0	0 0	0 0	66,401 66,401	end of 14
end of 15	75 37,820	0 144,075	0 1,624,865	0 1,806,760	0 0	0 0	35,640 32,886	0 0	0 0	0 0	0 0	68,526 68,526	end of 15
end of 16	76 39,333	0 149,838	0 1,722,357	0 1,911,528	0 0	0 0	36,780 33,938	0 0	0 0	0 0	0 0	70,719 70,719	end of 16
		0 0	0 0	0 0	0 0	0 0	248,037 373,357	0 0	0 0	0 0	0 0	344,505 965,898	

Orange backgrounds indicate hypothetical returns

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

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Step 19: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

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: 1 years

Accounts									Incomes				
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return initial amount bonus % w/bonus	60 21,000 0.00 % 21,000	4.00 % 80,000 0.00 % 80,000	IRA 80,000 0.00 % 80,000	IRA 678,000 0.00 % 678,000	IRA 779,000 0 779,000	Subtotal of account incomes 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %				
end of 1	61 21,840	0 83,200	0 718,680	0 823,720	0 0	0 0	60,000 61,320	0 0	0 0	0 0	0 0	60,000 61,320	end of 1 end of 2
end of 3	63 23,622	0 89,989	0 807,509	0 921,120	0 0	0 0	62,669 64,048	0 0	0 0	0 0	0 0	62,669 64,048	end of 3 end of 4
end of 5	65 25,550	0 97,332	0 907,317	0 1,030,199	0 0	0 0	26,010 24,000	0 0	0 0	0 0	0 0	50,010 50,010	end of 5
end of 6	66 26,572	0 101,226	0 961,756	0 1,089,553	0 0	0 0	26,842 24,768	0 0	0 0	0 0	0 0	51,610 51,610	end of 6
end of 7	67 27,635	0 105,275	0 1,019,461	0 1,152,370	0 0	0 0	27,701 25,561	0 0	0 0	0 0	0 0	53,262 53,262	end of 7
end of 8	68 28,740	0 109,486	0 1,080,628	0 1,218,854	0 0	0 0	28,588 26,379	0 0	0 0	0 0	0 0	54,966 54,966	end of 8
end of 9	69 29,890	0 113,865	0 1,145,466	0 1,289,221	0 0	0 0	29,503 27,223	0 0	0 0	0 0	0 0	56,725 56,725	end of 9
end of 10	70 31,085	0 118,420	0 1,214,194	0 1,363,699	0 0	0 0	30,447 28,094	0 0	0 0	0 0	0 0	58,540 58,540	end of 10
end of 11	71 32,329	0 123,156	0 1,287,046	0 1,442,530	0 0	0 0	31,421 28,993	0 0	0 0	0 0	0 0	60,414 60,414	end of 11
end of 12	72 33,622	0 128,083	0 1,364,268	0 1,525,972	0 0	0 0	32,426 29,921	0 0	0 0	0 0	0 0	62,347 62,347	end of 12
end of 13	73 34,967	0 133,206	0 1,446,124	0 1,614,297	0 0	0 0	33,464 30,878	0 0	0 0	0 0	0 0	64,342 64,342	end of 13
end of 14	74 36,365	0 138,534	0 1,532,892	0 1,707,791	0 0	0 0	34,535 31,866	0 0	0 0	0 0	0 0	66,401 66,401	end of 14
end of 15	75 37,820	0 144,075	0 1,624,865	0 1,806,760	0 0	0 0	35,640 32,886	0 0	0 0	0 0	0 0	68,526 68,526	end of 15
end of 16	76 39,333	0 149,838	0 1,722,357	0 1,911,528	0 0	0 0	36,780 33,938	0 0	0 0	0 0	0 0	70,719 70,719	end of 16
		0 0	0 0	0 0	0 0	0 0	248,037 373,357	0 0	0 0	0 0	0 0	344,505 965,898	

Orange backgrounds indicate hypothetical returns

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Step 20: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

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

Scenario | New Scenario

Accounts										Incomes				
Planning Horizon	16 years			SEP-IRA (1)		IRA (1)		401K (1)						
	Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return initial amount bonus % w/bonus	60	4.00 % 21,000 0.00 % 21,000	IRA	4.00 % 80,000 0.00 % 80,000	IRA	6.00 % 678,000 0.00 % 678,000	IRA	779,000 0	Subtotal of account incomes	Manage 2.20 %	Manage 3.20 %	Manage 3.20 %		
end of 1	61	21,840 0	83,200 0	718,680 0	823,720 0	60,000 0	0 0	60,000 0	60,000 0	60,000 0	60,000 0	60,000 0	end of 1	
end of 2	62	22,714 0	86,528 0	761,801 0	871,042 0	61,320 0	0 0	61,320 0	61,320 0	61,320 0	61,320 0	61,320 0	end of 2	
end of 3	63	23,622 0	89,989 0	807,509 0	921,120 0	62,669 0	0 0	62,669 0	62,669 0	62,669 0	62,669 0	62,669 0	end of 3	
end of 4	64	24,567 0	93,589 0	855,959 0	974,115 0	64,048 0	0 0	64,048 0	64,048 0	64,048 0	64,048 0	64,048 0	end of 4	
end of 5	65	25,550 0	97,332 0	907,317 0	1,030,199 0	0 0	26,010 0	24,000 0	50,010 0	50,010 0	50,010 0	50,010 0	end of 5	
end of 6	66	26,572 0	101,226 0	961,756 0	1,089,553 0	0 0	26,842 0	24,768 0	51,610 0	51,610 0	51,610 0	51,610 0	end of 6	
end of 7	67	27,635 0	105,275 0	1,019,451 0	1,152,370 0	0 0	27,701 0	25,561 0	53,262 0	53,262 0	53,262 0	53,262 0	end of 7	
end of 8	68	28,740 0	109,486 0	1,080,628 0	1,218,854 0	0 0	28,588 0	26,379 0	54,966 0	54,966 0	54,966 0	54,966 0	end of 8	
end of 9	69	29,890 0	113,865 0	1,145,466 0	1,289,221 0	0 0	29,503 0	27,223 0	56,725 0	56,725 0	56,725 0	56,725 0	end of 9	
end of 10	70	31,085 0	118,420 0	1,214,194 0	1,363,699 0	0 0	30,447 0	28,094 0	58,540 0	58,540 0	58,540 0	58,540 0	end of 10	
end of 11	71	32,329 0	123,156 0	1,287,046 0	1,442,530 0	0 0	31,421 0	28,993 0	60,414 0	60,414 0	60,414 0	60,414 0	end of 11	
end of 12	72	33,622 0	128,083 0	1,364,268 0	1,525,972 0	0 0	32,426 0	29,921 0	62,347 0	62,347 0	62,347 0	62,347 0	end of 12	
end of 13	73	34,967 0	133,206 0	1,446,124 0	1,614,297 0	0 0	33,464 0	30,878 0	64,342 0	64,342 0	64,342 0	64,342 0	end of 13	
end of 14	74	36,365 0	138,534 0	1,532,892 0	1,707,791 0	0 0	34,535 0	31,866 0	66,401 0	66,401 0	66,401 0	66,401 0	end of 14	
end of 15	75	37,820 0	144,075 0	1,624,865 0	1,806,760 0	0 0	35,640 0	32,886 0	68,526 0	68,526 0	68,526 0	68,526 0	end of 15	
end of 16	76	39,333 0	149,838 0	1,722,357 0	1,911,528 0	0 0	36,780 0	33,938 0	70,719 0	70,719 0	70,719 0	70,719 0	end of 16	
				0 0	0 0	0 0	248,037 0	373,357 0	344,505 0	965,898 0				

Orange backgrounds indicate hypothetical returns



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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.