

Renaming a Current Scenario

01/12/2026 11:09 am EST

Within the structured income plan you can rename a current scenario to a unique title. Below is a step-by-step guide for renaming a current scenario.

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

The screenshot displays the SIPS Retirement Planning System interface. At the top, there's a navigation bar with links: YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below this is a header area with 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main navigation bar includes: CLIENT DASHBOARD, STRUCTURED INCOME PLANNING, CASH FLOW AND TAX ADVISOR, ASSET ALLOCATION AND NET WORTH, GRAPHS, REPORTS, and TOOLS. The 'Structured Income Planning' section is active, showing a sub-heading 'Structured Income Planning' with two buttons: 'Edit' (highlighted with a red arrow) and 'Dynamic Mode'. Below the buttons is a 'Scenario' dropdown menu set to 'New Scenario'. The main content area shows a table with columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Wages (3)', 'SS', 'Pension', 'Total Income', and 'Year'. The table is divided into sections for 'Savings (2)', 'ROTH IRA (2)', '401K (2)', and 'BNFL IRA (2)'. The table contains data for years 55 through 71, with orange backgrounds indicating hypothetical returns. A legend at the bottom left states: 'Orange backgrounds indicate hypothetical returns'. The bottom right corner contains links for 'PRIVACY POLICY' and 'TERMS OF USE'.

Year	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension	Total Income	Year
55	1.00 %	4.00 %	6.00 %	6.00 %	6.00 %	6.00 %	6.00 %	6.00 %	55
56	30,300	0	104,000	0	175,100	0	0	150,000	end of 1
57	30,603	0	108,160	0	185,871	0	0	153,300	end of 2
58	30,909	0	112,486	0	196,650	0	0	156,673	end of 3
59	31,218	0	116,986	0	207,979	0	0	160,119	end of 4
60	31,530	0	121,665	0	220,680	0	0	163,642	end of 5
61	31,846	0	126,532	0	232,871	0	0	167,242	end of 6
62	32,164	0	131,593	0	246,431	0	0	170,921	end of 7
63	32,486	0	136,857	0	260,929	0	0	174,682	end of 8
64	32,811	0	142,331	0	276,043	0	0	178,525	end of 9
65	33,139	0	148,024	0	292,158	0	22,542	180,094	end of 10
66	33,470	0	153,945	0	309,181	0	23,263	185,958	end of 11
67	33,805	0	160,103	0	327,256	0	24,008	191,951	end of 12
68	34,143	0	166,507	0	346,028	0	24,776	198,028	end of 13
69	34,484	0	173,168	0	366,832	0	25,569	204,287	end of 14
70	34,829	0	180,094	0	388,165	0	26,387	210,841	end of 15
71	35,177	0	187,298	0	410,921	0	27,231	217,756	end of 16

Step 2: Edit or Add Scenario: Click on the green Edit or Add Scenario 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

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

Scenario

New Scenario

Planning Horizon

16 years

Savings (2)

ROTH IRA (2)

401K (2)

BNFL IRA (2)

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension	Total Income	Year
net return	55	1.00 %		4.00 %		6.00 %		6.00 %							
initial amount		30,000		100,000		630,000		900,000	1,660,000	0	150,000	0	0	150,000	end of 1
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	0	0	153,300	0	0	153,300	end of 2
w/bonus		30,000	Manage	100,000	Manage	630,000	Manage	900,000	1,660,000	0	156,673	0	0	156,673	end of 3
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	1,756,100	0	160,119	0	0	160,119	end of 4
end of 2	57	30,603	0	108,160	0	707,848	0	1,011,240	1,857,871	0	163,642	0	0	163,642	end of 5
end of 3	58	30,909	0	112,486	0	750,330	0	1,071,914	1,965,650	0	167,242	0	0	167,242	end of 6
end of 4	59	31,218	0	116,986	0	795,330	0	1,136,229	2,079,793	0	170,921	0	0	170,921	end of 7
end of 5	60	31,530	0	121,665	0	843,002	0	1,204,403	2,200,680	0	174,682	0	0	174,682	end of 8
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	2,328,711	0	178,525	0	0	178,525	end of 9
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	2,464,310	0	22,542	30,000	52,542	end of 10	
end of 8	63	32,486	0	136,857	0	1,004,124	0	1,434,462	2,607,929	0	23,263	30,960	54,223	end of 11	
end of 9	64	32,811	0	142,331	0	1,064,371	0	1,520,530	2,760,043	0	24,008	31,951	55,958	end of 12	
end of 10	65	33,139	0	148,024	0	1,128,233	0	1,611,762	2,921,158	0	24,776	32,973	57,749	end of 13	
end of 11	66	33,470	0	153,945	0	1,195,927	0	1,708,468	3,091,810	0	25,569	34,028	59,597	end of 14	
end of 12	67	33,805	0	160,103	0	1,267,663	0	1,810,976	3,272,566	0	26,387	35,117	61,504	end of 15	
end of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	3,464,028	0	27,231	36,241	63,472	end of 16	
end of 14	69	34,484	0	173,168	0	1,424,368	0	2,034,812	3,666,832	0					
end of 15	70	34,829	0	180,094	0	1,509,830	0	2,156,900	3,881,654	0					
end of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	4,109,210	0					
		0	0	0	0	0	0	0	0	0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS

Retirement Planning System

PRIVACY POLICY

TERMS OF USE

Step 3: Rename Current Scenario To: Click in the text box next to the green button titled rename current scenario to.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#)
[Cancel](#)

Scenario:

[Delete Current Scenario](#)
[Rename Current Scenario To...](#)
[Create New Scenario As...](#)
[Replicate Current Scenario As...](#)

Accounts

Account	Also Used In	Replicate	Remove
Savings (2)		Replicate	Remove
ROTH IRA (2)		Replicate	Remove
401K (2)		Replicate	Remove
BNFL IRA (2)		Replicate	Remove

Add Account [Common](#) [Replicate](#) [New](#)

Incomes

Income	Also Used In	Replicate	Remove
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove

Add Income [Common](#) [Replicate](#) [New](#)

Target

Add Target [Common](#) [Replicate](#) [New](#)

Tax

Add Tax [Common](#) [Replicate](#) [New](#)

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 4: Edit the Text Box: Delete default name and type in the new title for the current scenario.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To

Create New Scenario As

Replicate Current Scenario As

Accounts Also Used In

Account	Also Used In	Replicate	Remove
Savings (2)		Replicate	Remove
ROTH IRA (2)		Replicate	Remove
401K (2)		Replicate	Remove
BNFL IRA (2)		Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Add Target Common Replicate New

Tax Also Used In

Add Tax Common Replicate New

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 5: Clicking: Double click on the green Rename Current Scenario to button located next to the text box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To

Create New Scenario As

Replicate Current Scenario As

Accounts Also Used In

Account	Also Used In	Replicate	Remove
Savings (2)		Replicate	Remove
ROTH IRA (2)		Replicate	Remove
401K (2)		Replicate	Remove
BNFL IRA (2)		Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Add Target Common Replicate New

Tax Also Used In

Add Tax Common Replicate New

SIPS Retirement Planning System


PRIVACY POLICY TERMS OF USE

Step 6: Scenario Text Box: The current scenario name should be replaced over the old name in the scenario text box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario Current Scenario Version 1 

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts Also Used In

Account	Also Used In	Replicate	Remove
Savings (2)		Replicate	Remove
ROTH IRA (2)		Replicate	Remove
401K (2)		Replicate	Remove
BNFL IRA (2)		Replicate	Remove

[Add Account](#) [Common](#) [Replicate](#) [New](#)

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove


[Add Income](#) [Common](#) [Replicate](#) [New](#)

Target Also Used In

[Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax Also Used In

[Add Tax](#) [Common](#) [Replicate](#) [New](#)

 [PRIVACY POLICY](#) [TERMS OF USE](#)

Step 7: Save: Click on the green save button underneath the manage scenario subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario Current Scenario Version 1

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts Also Used In

Account	Also Used In	Replicate	Remove
Savings (2)		Replicate	Remove
ROTH IRA (2)		Replicate	Remove
401K (2)		Replicate	Remove
BNFL IRA (2)		Replicate	Remove

[Add Account](#) [Common](#) [Replicate](#) [New](#)

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove


[Add Income](#) [Common](#) [Replicate](#) [New](#)

Target Also Used In

[Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax Also Used In

[Add Tax](#) [Common](#) [Replicate](#) [New](#)

 [PRIVACY POLICY](#) [TERMS OF USE](#)

Step 8: Structured Income Plan Scenario: In the text box the new current title should be reflected.

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 Inv Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario: Current Scenario Version 1

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension (3)	Total Income	Year
net return	55	1.00 %		4.00 %		6.00 %	IRA	6.00 %	bIRA						
initial amount		30,000		100,000		630,000		900,000	1,660,000	Subtotal of account incomes	Manage Infi Factor 2.20 %	Manage Infi Factor 3.20 %	Manage Infi Factor 3.20 %		
bonus % w/ bonus		0.00 %		0.00 %		0.00 %		0.00 %	1,660,000						
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	1,756,100	0	150,000	0	0	150,000	end of 1
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	1,857,871	0	153,300	0	0	153,300	end of 2
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	1,965,650	0	156,673	0	0	156,673	end of 3
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	2,079,793	0	160,119	0	0	160,119	end of 4
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	2,200,680	0	163,642	0	0	163,642	end of 5
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	2,328,711	0	167,242	0	0	167,242	end of 6
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	2,464,310	0	170,921	0	0	170,921	end of 7
end of 8	63	32,486	0	136,857	0	1,004,124	0	1,434,462	2,607,929	0	174,682	0	0	174,682	end of 8
end of 9	64	32,811	0	142,331	0	1,064,371	0	1,520,530	2,760,943	0	178,525	0	0	178,525	end of 9
end of 10	65	33,139	0	148,024	0	1,128,233	0	1,611,762	2,921,158	0	0	22,542	30,000	52,542	end of 10
end of 11	66	33,470	0	153,945	0	1,195,927	0	1,708,468	3,091,810	0	0	23,263	30,960	54,223	end of 11
end of 12	67	33,805	0	160,103	0	1,267,683	0	1,810,976	3,272,566	0	0	24,008	31,951	55,958	end of 12
end of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	3,464,028	0	0	24,776	32,973	57,749	end of 13
end of 14	69	34,484	0	173,168	0	1,424,368	0	2,034,812	3,666,832	0	0	25,569	34,028	59,597	end of 14
end of 15	70	34,829	0	180,094	0	1,509,830	0	2,156,900	3,881,654	0	0	26,387	35,117	61,504	end of 15
end of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	4,109,210	0	0	27,231	36,241	63,472	end of 16
			0		0		0			0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 9: 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: [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 Inv Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario: Current Scenario Version 1

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension (3)	Total Income	Year
net return	55	1.00 %		4.00 %		6.00 %	IRA	6.00 %	bIRA						
initial amount		30,000		100,000		630,000		900,000	1,660,000	Subtotal of account incomes	Manage Infi Factor 2.20 %	Manage Infi Factor 3.20 %	Manage Infi Factor 3.20 %		
bonus % w/ bonus		0.00 %		0.00 %		0.00 %		0.00 %	1,660,000						
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	1,756,100	0	150,000	0	0	150,000	end of 1
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	1,857,871	0	153,300	0	0	153,300	end of 2
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	1,965,650	0	156,673	0	0	156,673	end of 3
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	2,079,793	0	160,119	0	0	160,119	end of 4
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	2,200,680	0	163,642	0	0	163,642	end of 5
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	2,328,711	0	167,242	0	0	167,242	end of 6
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	2,464,310	0	170,921	0	0	170,921	end of 7
end of 8	63	32,486	0	136,857	0	1,004,124	0	1,434,462	2,607,929	0	174,682	0	0	174,682	end of 8
end of 9	64	32,811	0	142,331	0	1,064,371	0	1,520,530	2,760,943	0	178,525	0	0	178,525	end of 9
end of 10	65	33,139	0	148,024	0	1,128,233	0	1,611,762	2,921,158	0	0	22,542	30,000	52,542	end of 10
end of 11	66	33,470	0	153,945	0	1,195,927	0	1,708,468	3,091,810	0	0	23,263	30,960	54,223	end of 11
end of 12	67	33,805	0	160,103	0	1,267,683	0	1,810,976	3,272,566	0	0	24,008	31,951	55,958	end of 12
end of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	3,464,028	0	0	24,776	32,973	57,749	end of 13
end of 14	69	34,484	0	173,168	0	1,424,368	0	2,034,812	3,666,832	0	0	25,569	34,028	59,597	end of 14
end of 15	70	34,829	0	180,094	0	1,509,830	0	2,156,900	3,881,654	0	0	26,387	35,117	61,504	end of 15
end of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	4,109,210	0	0	27,231	36,241	63,472	end of 16
			0		0		0			0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 10: 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 | 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](#) [Dynamic Mode](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension	Total Income	Year
net return	55	1.00 %		4.00 %		6.00 %		IRA	6.00 %	bIRA					
initial amount		30,000		100,000		630,000		900,000	1,660,000	Subtotal of account incomes					
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	1,660,000						
w/bonus		30,000		100,000		630,000		900,000							
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	150,000	end of 1
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	0	1,857,871	0	153,300	0	153,300	end of 2
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	0	1,965,650	0	156,673	0	156,673	end of 3
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	0	2,079,793	0	160,119	0	160,119	end of 4
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	0	2,200,680	0	163,642	0	163,642	end of 5
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,328,711	0	167,242	0	167,242	end of 6
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	0	2,464,310	0	170,921	0	170,921	end of 7
end of 8	63	32,486	0	136,857	0	1,004,124	0	1,434,462	0	2,607,929	0	174,682	0	174,682	end of 8
end of 9	64	32,811	0	142,331	0	1,064,371	0	1,520,530	0	2,760,043	0	178,525	0	178,525	end of 9
end of 10	65	33,139	0	148,024	0	1,128,233	0	1,611,762	0	2,921,158	0	182,400	30,000	212,400	end of 10
end of 11	66	33,470	0	153,945	0	1,195,927	0	1,708,468	0	3,091,810	0	186,323	30,960	217,283	end of 11
end of 12	67	33,805	0	160,103	0	1,267,683	0	1,810,976	0	3,272,566	0	190,296	31,951	222,247	end of 12
end of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	0	3,464,028	0	194,309	32,973	227,282	end of 13
end of 14	69	34,484	0	173,168	0	1,424,368	0	2,034,812	0	3,666,832	0	198,369	34,028	232,397	end of 14
end of 15	70	34,829	0	180,094	0	1,509,830	0	2,156,900	0	3,881,654	0	202,476	35,117	237,653	end of 15
end of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	0	4,109,210	0	206,623	36,241	242,864	end of 16
			0		0		0		0		1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 11: 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

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 Ins-Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension	Total Income	Year
net return	55	1.00 %		4.00 %		6.00 %		IRA	6.00 %	bIRA					
initial amount		30,000		100,000		630,000		900,000	1,660,000	Subtotal of account incomes					
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	1,660,000						
w/bonus		30,000		100,000		630,000		900,000							
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	150,000	end of 1
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	0	1,857,871	0	153,300	0	153,300	end of 2
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	0	1,965,650	0	156,673	0	156,673	end of 3
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	0	2,079,793	0	160,119	0	160,119	end of 4
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	0	2,200,680	0	163,642	0	163,642	end of 5
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,328,711	0	167,242	0	167,242	end of 6
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	0	2,464,310	0	170,921	0	170,921	end of 7
end of 8	63	32,486	0	136,857	0	1,004,124	0	1,434,462	0	2,607,929	0	174,682	0	174,682	end of 8
end of 9	64	32,811	0	142,331	0	1,064,371	0	1,520,530	0	2,760,043	0	178,525	0	178,525	end of 9
end of 10	65	33,139	0	148,024	0	1,128,233	0	1,611,762	0	2,921,158	0	182,400	30,000	212,400	end of 10
end of 11	66	33,470	0	153,945	0	1,195,927	0	1,708,468	0	3,091,810	0	186,323	30,960	217,283	end of 11
end of 12	67	33,805	0	160,103	0	1,267,683	0	1,810,976	0	3,272,566	0	190,296	31,951	222,247	end of 12
end of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	0	3,464,028	0	194,309	32,973	227,282	end of 13
end of 14	69	34,484	0	173,168	0	1,424,368	0	2,034,812	0	3,666,832	0	198,369	34,028	232,397	end of 14
end of 15	70	34,829	0	180,094	0	1,509,830	0	2,156,900	0	3,881,654	0	202,476	35,117	237,653	end of 15
end of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	0	4,109,210	0	206,623	36,241	242,864	end of 16
			0		0		0		0		1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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Step 12: 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

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

EditDynamic Mode

ScenarioCurrent Scenario Version 1

Planning Horizon16 years

Savings (2)ROTH IRA (2)401K (2)BNFL IRA (2)

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension	Total Income	Year	
net return	55	1.00 %	4.00 %	6.00 %	IRA	6.00 %	bIRA		1,660,000	Subtotal of account incomes	Inf Factor 2.20 %	Inf Factor 3.20 %	Inf Factor 3.20 %			
initial amount		30,000	100,000	630,000		900,000			0							
bonus % w/bonus		0.00 %	0.00 %	0.00 %		0.00 %			1,660,000							
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	150,000	end of 1	
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	0	1,857,871	0	153,300	0	153,300	end of 2	
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	0	1,965,650	0	156,673	0	156,673	end of 3	
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	0	2,079,793	0	160,119	0	160,119	end of 4	
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	0	2,200,680	0	163,642	0	163,642	end of 5	
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,328,711	0	167,242	0	167,242	end of 6	
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	0	2,464,310	0	170,921	0	170,921	end of 7	
end of 8	63	32,486	0	136,857	0	1,004,124	0	1,434,462	0	2,607,929	0	174,682	0	174,682	end of 8	
end of 9	64	32,811	0	142,331	0	1,064,371	0	1,520,530	0	2,760,043	0	178,525	0	178,525	end of 9	
end of 10	65	33,139	0	148,024	0	1,128,233	0	1,611,762	0	2,921,158	0	0	22,542	30,000	52,542	end of 10
end of 11	66	33,470	0	153,945	0	1,195,927	0	1,708,468	0	3,091,810	0	0	23,263	30,960	54,223	end of 11
end of 12	67	33,805	0	160,103	0	1,267,683	0	1,810,976	0	3,272,566	0	0	24,008	31,951	55,958	end of 12
end of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	0	3,464,028	0	0	24,776	32,973	57,749	end of 13
end of 14	69	34,484	0	173,168	0	1,424,368	0	2,034,812	0	3,666,832	0	0	25,569	34,028	59,597	end of 14
end of 15	70	34,829	0	180,094	0	1,509,830	0	2,156,900	0	3,881,654	0	0	26,387	35,117	61,504	end of 15
end of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	0	4,109,210	0	0	27,231	36,241	63,472	end of 16
			0		0		0		0		0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPSPersonal Retirement System

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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.