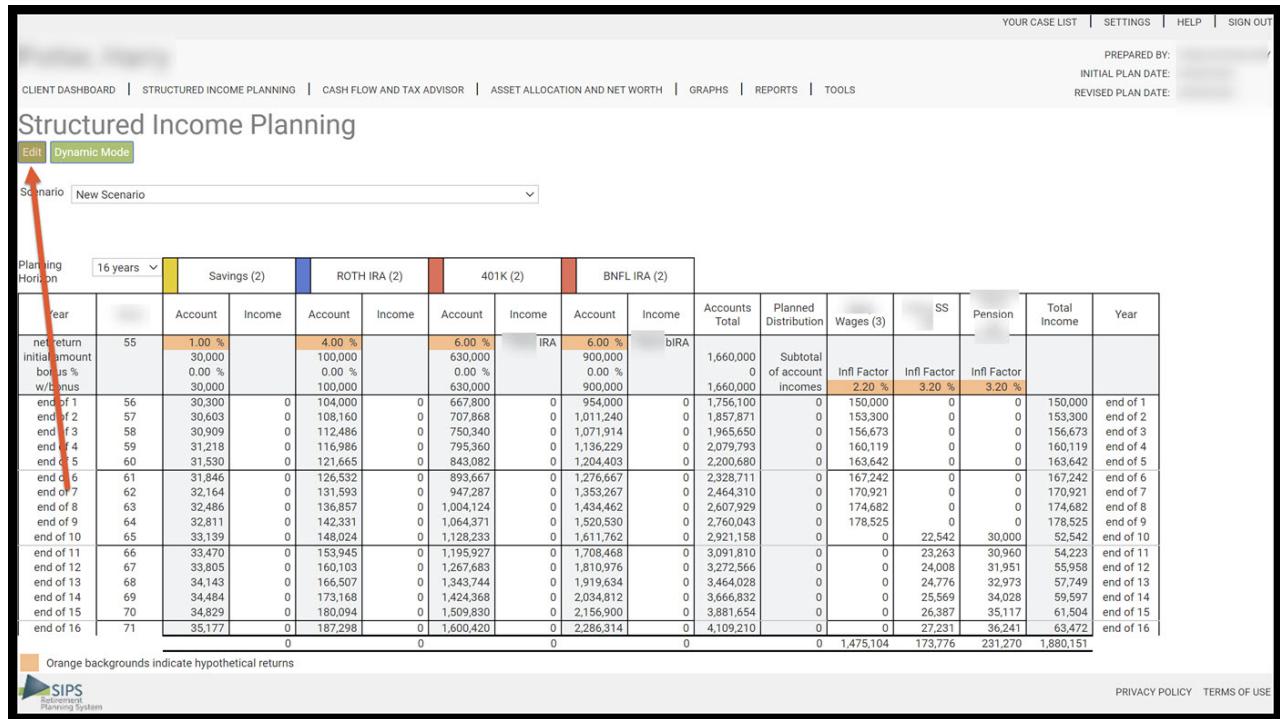


Renaming a Current Scenario

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 shows the 'Structured Income Planning' section of a software interface. 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 title 'Structured Income Planning' is displayed, followed by 'Edit' and 'Dynamic Mode' buttons. A dropdown menu shows 'Scenario' and 'New Scenario'. The main area is a table with columns for 'Planning Horizon' (16 years), 'Year', 'Account', 'Income', and various investment accounts like 'Savings (2)', 'ROTH IRA (2)', '401K (2)', and 'BNFL IRA (2)'. The table contains numerical data for each account over the 16-year period. At the bottom of the table, an orange note says 'Orange backgrounds indicate hypothetical returns'. The SIPS logo is in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' are in the bottom right.

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 initial amount bonus % w/bonus	55 30,000 0.00 % 30,000	1.00 % 4.00 % 0.00 % 30,000	6.00 % 630,000 0.00 % 630,000	6.00 % 900,000 0.00 % 900,000	6.00 % bIRA 1,660,000 0	1,660,000 0	Subtotal of account incomes	2.20 % 1,857,871 0	Manage Infl Factor 150,000 0	Manage Infl Factor 153,300 0	Manage Infl Factor 156,673 0	Manage Infl Factor 160,119 0	Manage Infl Factor 163,642 0	Total Income	Year		
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	707,838	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	750,310	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	795,310	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	843,022	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	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	0	0	0	0	0	0	0	0	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: New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts: Savings (2), ROTH IRA (2), 401K (2), BNFL IRA (2)

Incomes: Wages (3), SS (3), Pension (3)

Target

Tax

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Add Account | Common | Replicate | New

Add Income | Common | Replicate | New

Add Target | Common | Replicate | New

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.

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ... **Current Scenario Version 1**

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

Savings (2)

ROTH IRA (2)

401K (2)

BNFL IRA (2)

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Incomes

Wages (3)

SS (3)

Pension (3)

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Target

Also Used In

Add Target Common Replicate New

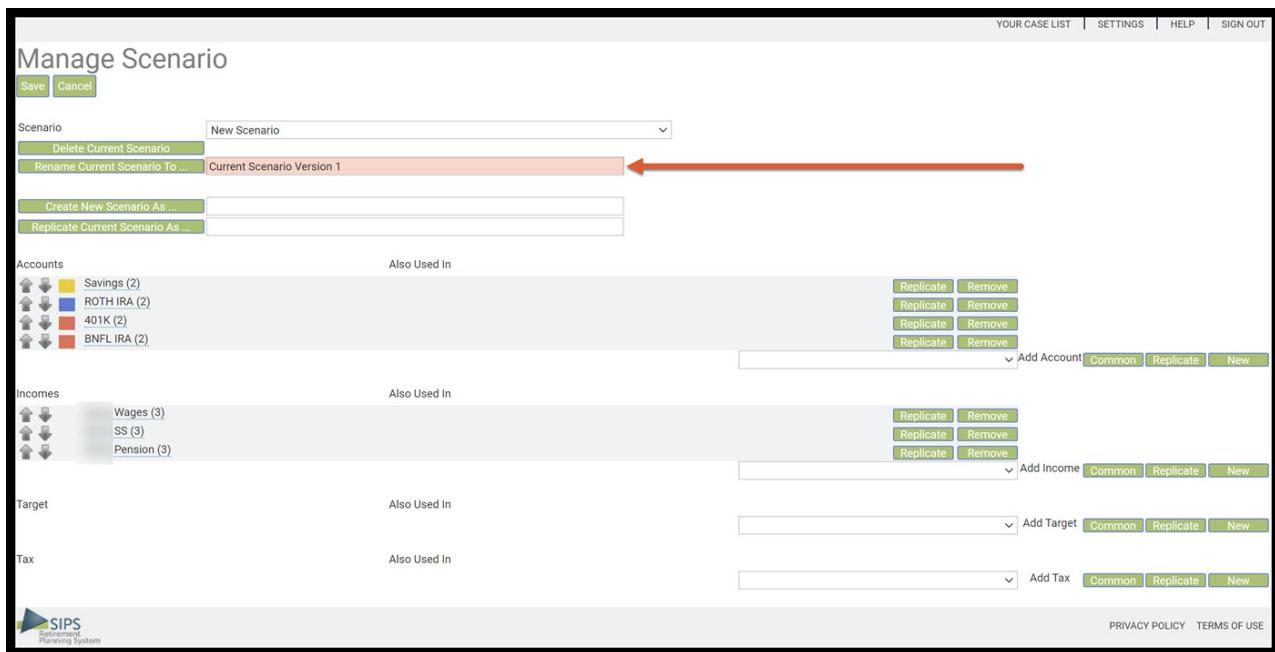
Tax

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.

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ... **Current Scenario Version 1**

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

Savings (2)

ROTH IRA (2)

401K (2)

BNFL IRA (2)

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Incomes

Wages (3)

SS (3)

Pension (3)

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Target

Also Used In

Add Target Common Replicate New

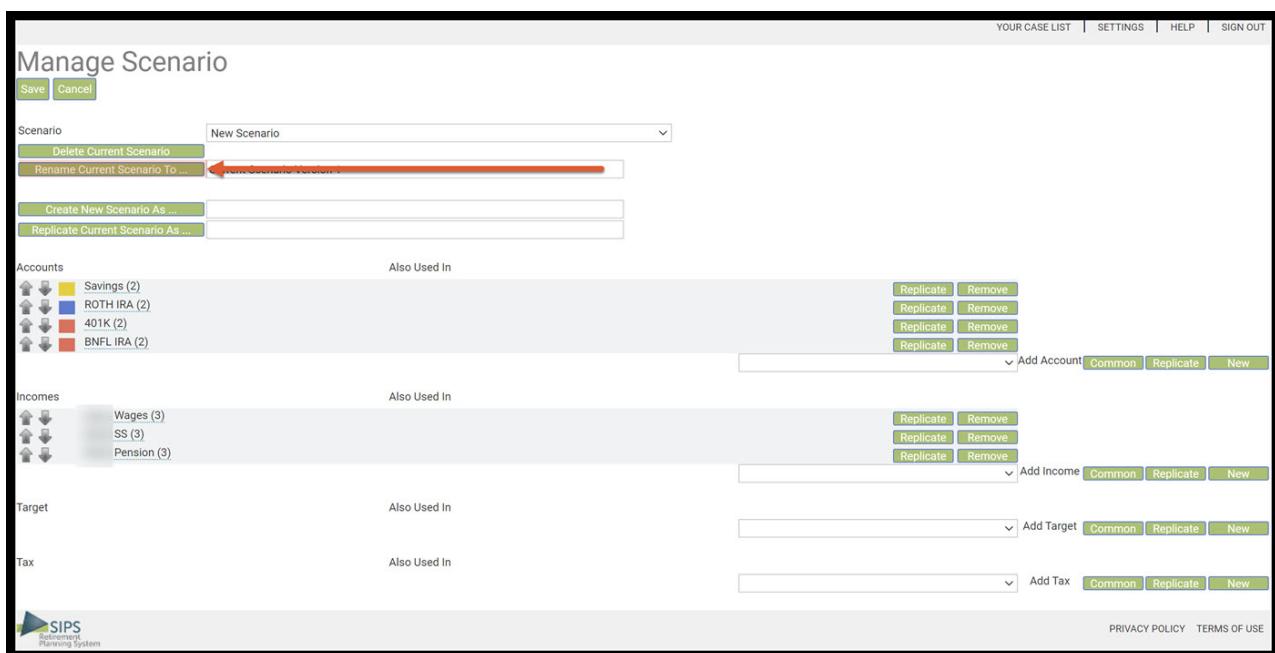
Tax

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.

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

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

Replicate Remove

Incomes Also Used In

Wages (3) SS (3) Pension (3)

Replicate Remove

Target Also Used In

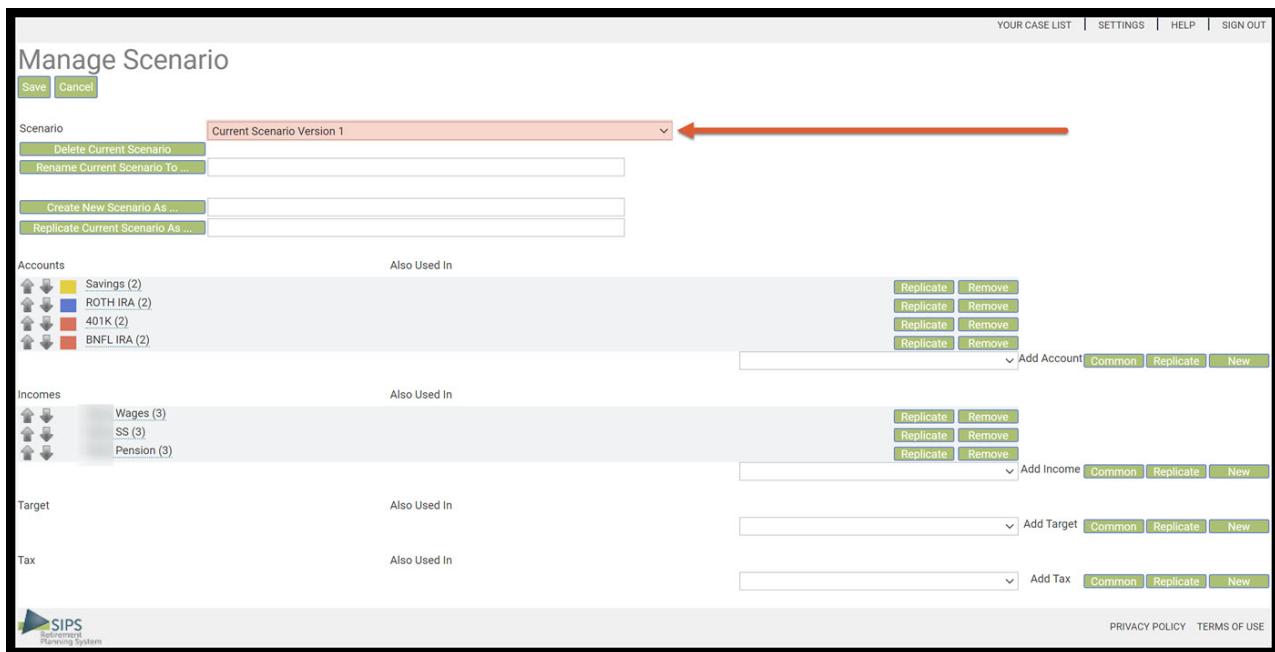
Replicate Remove

Tax Also Used In

Replicate Remove

PRIVACY POLICY TERMS OF USE

SIPS Retirement Planning System



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

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

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

Replicate Remove

Incomes Also Used In

Wages (3) SS (3) Pension (3)

Replicate Remove

Target Also Used In

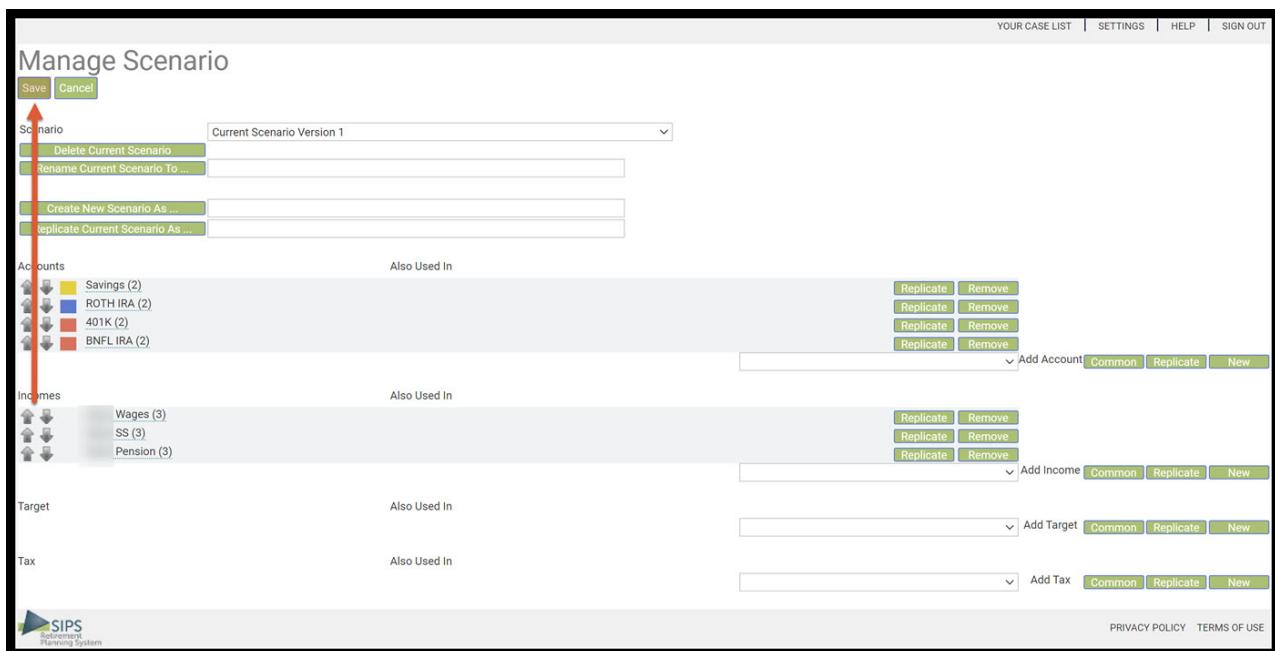
Replicate Remove

Tax Also Used In

Replicate Remove

PRIVACY POLICY TERMS OF USE

SIPS Retirement Planning System



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:
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 | Current Scenario Version 1

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 (3)	Total Income	Year	
net return	55	1.00 %	4.00 %	6.00 %	6.00 %	IRA	900,000	bIRA	1,660,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor				
initial amount	30,000	100,000	630,000	900,000			0		0								
bonus % w/bonus	0.00 %	0.00 %	0.00 %	0.00 %													
	30,000	30,603	108,160	707,868	0	1,011,240	0	1,857,871	0	153,300	0	0	0	153,300	end of 2		
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	0	150,000	end of 1	
end of 2	57	30,000	0	108,160	0	707,868	0	1,011,240	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	2,760,043	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	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	0	0	0	0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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

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

Scenario | Current Scenario Version 1

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 (3)	Total Income	Year	
net return	55	1.00 %	4.00 %	6.00 %	6.00 %	IRA	900,000	bIRA	1,660,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor				
initial amount	30,000	100,000	630,000	900,000			0		0								
bonus % w/bonus	0.00 %	0.00 %	0.00 %	0.00 %													
	30,000	30,603	108,160	707,868	0	1,011,240	0	1,857,871	0	153,300	0	0	0	153,300	end of 2		
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	0	150,000	end of 1	
end of 2	57	30,000	0	108,160	0	707,868	0	1,011,240	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	2,760,043	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	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	0	0	0	0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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

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

Scenario | Current Scenario Version 1

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 (3)	Total Income	Year	
net return	55	1.00 %	4.00 %	6.00 %	6.00 %	IRA	900,000	bIRA	1,660,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor				
initial amount	30,000	100,000	630,000	900,000			0		0								
bonus % w/bonus	0.00 %	0.00 %	0.00 %	0.00 %													
	30,000	30,603	108,160	707,868	0	1,011,240	0	1,857,871	0	153,300	0	0	0	153,300	end of 2		
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	0	150,000	end of 1	
end of 2	57	30,000	0	108,160	0	707,868	0	1,011,240	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	2,760,043	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	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	0	0	0	0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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

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

Scenario | Current Scenario Version 1

Planning Horizon | 16 years | Savings (2) | ROTH IRA (2) | 401K (2) | BNFL IRA (2)

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: Initials

INITIAL PLAN DATE: Initial Date

REVISED PLAN DATE: Revised 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: [Current Scenario Version 1](#)

Planning Horizon: [16 years](#)

Year		Savings (2)		ROTH IRA (2)		401K (2)		BNFL IRA (2)		Accounts Total	Planned Distribution	Wages (3)	SS	Pension (3)	Total Income	Year
		Account	Income	Account	Income	Account	Income	Account	Income							
net return	55	1.00 %		4.00 %		6.00 %		6.00 %								
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 %		0		Manag.	Manag.	Manag.		
w/bonus		30,000	Manage	100,000	Manage	630,000	Manage	900,000	Manage	1,660,000		Infl Factor	Infl Factor	Infl Factor		
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	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	0	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	0	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	0	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	0	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	0	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	1,355,267	0	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	0	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	0	2,760,043	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	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	22,263	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	180,994	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	0	0	0	0	1,475,104	173,776	231,270	1,880,151	

Orange backgrounds indicate hypothetical returns

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:
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: Current Scenario Version 1

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 %	IRA	6.00 %	BiRA	1,660,000	Subtotal of account incomes	2.20 %	Infl Factor	Infl Factor	Infl Factor	
initial amount		30,000		100,000		630,000		900,000				150,000	0	0	0	150,000
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0.00 %				153,300	0	0	0	153,300
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	0	0	150,000
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	0	1,857,871	0	153,300	0	0	0	153,300
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	0	1,965,650	0	156,673	0	0	0	156,673
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	0	2,079,793	0	160,119	0	0	0	160,119
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	0	2,200,680	0	163,642	0	0	0	163,642
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,328,711	0	167,242	0	0	0	167,242
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	0	2,464,310	0	170,921	0	0	0	170,921
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	0	0	174,682
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	0	0	178,525
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	0	0	0	1,475,104	173,776	231,270	1,880,151		

Orange backgrounds indicate hypothetical returns

SIPS Structured Income 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:
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 Current Scenario Version 1

Planning Horizon 1 years

Year	Savings (2)		ROTH IRA (2)		401K (2)		BNFL IRA (2)		Accounts Total	Planned Distribution	Wages (3)	SS	Pension (3)	Total Income	Year	
	Account	Income	Account	Income	Account	Income	Account	Income								
net return	55	1.00 %	4.00 %		6.00 %	6.00 %	IRA	6.00 %	b/RA							
initial amount	30,000		100,000		630,000		900,000		1,660,000							
bonus % w/bonus	0.00 %		0.00 %		0.00 %		0.00 %		0							
	30,000	Manage	100,000	Manage	630,000	Manage	900,000	Manage	1,660,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor			
end of 1	56	30,300	0	104,000	0	667,800	0	954,000	0	1,756,100	0	150,000	0	0	150,000	
end of 2	57	30,603	0	108,160	0	707,868	0	1,011,240	0	1,857,871	0	153,300	0	0	153,300	
end of 3	58	30,909	0	112,486	0	750,340	0	1,071,914	0	1,965,650	0	156,673	0	0	156,673	
end of 4	59	31,218	0	116,986	0	795,360	0	1,136,229	0	2,079,793	0	160,119	0	0	160,119	
end of 5	60	31,530	0	121,665	0	843,082	0	1,204,403	0	2,200,680	0	163,642	0	0	163,642	
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,328,711	0	167,242	0	0	167,242	
end of 7	62	32,164	0	131,593	0	947,287	0	1,353,267	0	2,464,310	0	170,921	0	0	170,921	
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	0	174,682	
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	0	178,525	
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 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 12	67	33,805	0	160,103	0	1,267,683	0	1,810,976	0	3,327,566	0	0	24,008	31,951	55,958	
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 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 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 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	
						0	0	0		0	0	0	1,475,104	173,776	231,270	1,880,151

Orange backgrounds indicate hypothetical returns

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**

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 | Current Scenario Version 1

Planning Horizon		Savings (2)		ROTH IRA (2)		401K (2)		BNFL IRA (2)		Accounts Total	Planned Distribution	Wages (3)	SS	Pension	Total Income	Year	
Year		Account	Income	Account	Income	Account	Income	Account	Income								
net return	55	1.00 %		4.00 %		6.00 %	IRA	6.00 %	biRA								
initial amount		30,000		100,000		630,000		900,000									
bonus %		0.00 %		0.00 %		0.00 %		0.00 %									
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	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	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	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	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	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	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	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	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	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	182,368	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	186,223	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	190,081	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	193,940	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	197,829	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	201,708	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	205,587	0	27,231	36,241	63,472	end of 16
			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

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.