Replicate a Current Scenario As

09/17/2024 1:33 pm EDT

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

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

IENT DASHB	DARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	worth g	RAPHS F	EPORTS T	OOLS				PREPARED BY TIAL PLAN DATE SED PLAN DATE	E:
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Year		Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (4)	SS	Pension	Total	Year	
		1 00 0		4.00 %		6.00 %	IRA	6.00.0	bIRA	TOtal	Distribution	wayes (4)		(4)	income		
net return tial amount	55	1.00 % 30,000		4.00 %		630,000	IRA	6.00 % 900.000	DIRA	1,660,000	Subtotal						
bonus %		0.00 %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			
w/bonus		30,000		100,000		630,000		900,000		1,660,000	incomes	2.20 %	3.20 %	3.20 %			
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 end of 4	58 59	30,909 31,218	0	112,486 116,986	0	750,340 795,360	0	1,071,914	0	1,965,650 2,079,793	0	156,673 160,119	0	0	156,673 160,119	end of 3 end of 4	
end of 4 end of 5	60	31,218	0	121,665	0	843.082	0	1,136,229	0	2,079,793	0	163,642	0	0	163,642	end of 4 end of 5	
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,200,000	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	ő	170,921	0	ő	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 end of 13	67 68	33,805 34,143	0	160,103 166,507	0	1,267,683	0	1,810,976 1,919,634	0	3,272,566 3,464,028	0	0	24,008 24,776	31,951 32,973	55,958 57,749	end of 12 end of 13	
end of 13 end of 14	69	34,143	0	173,168	0	1,343,744	0	2,034,812	0	3,464,028	0	0	24,776	34,028	59,597	end of 13 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		
			etical returns														

Step 2: Edit or Add Scenario: Click on the green Edit or Add Scenario button underneath the Structured Income Planning sub-heading.

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	16 years 🗸	Cauli	ings (3)	POTh	IRA (3)	40	1K (3)	PNE	. IRA (3)	ľ.							
rizon		Savi	igs (3)	KOTH	1 IRA (3)	40	IK (3)	DINFL	. IRA (3)	10 m							
Year		Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (4)	SS	Pension (4)	Total Income	Year	
net return	55	1.00 %		4.00 %		6.00 %	IRA	6.00 %	bIRA	1.660.000	Cubtotal						
itial amount bonus %		30,000		0.00 %		630,000 0.00 %		900,000 0.00 %		1,660,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor			
w/bonus		30,000	Manage	100.000	Manage	630.000	Manage	900.000	Manage	1,660,000	incomes	2.20 %	3.20 %	3.20 %			
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 end of 7	61 62	31,846 32,164	0	126,532 131,593	0	893,667 947,287	0	1,276,667	0	2,328,711 2.464.310	0	167,242 170,921	0	0	167,242 170,921	end of 6 end of 7	
end of 7 end of 8	62	32,164	0	131,593	0	947,287	0	1,353,267	0	2,464,310 2,607,929	0	170,921	0	0	170,921	end of 7 end of 8	
end of 9	64	32,480	0	142.331	0	1,064,371	0	1,434,402	0	2,760.043	0	178,525	0	0	178,525	end of 9	
end of 10	65	33,139	Ő	148,024	0	1,128,233	0	1,611,762	0	2,921,158	Ő	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	36,241 231,270	63,472	end of 16	
		licate hypothe	•		U		0		0		U	1,475,104	1/3,//6	231,270	1,880,151		

Step 3: Replicate Current Scenario As: Click in the text box next to the green button titled replicate current scenario as.

		YOUR CASE LIST SETTINGS HELP SIGN OUT
Manage Scenar Save Cancel	io	
Scenario Delete Current Scenario Rename Current Scenario To	New Scenario	
Create New Scenario As Replicate Current Scenario As		<
Accounts Savings (3) ROTH IRA (3) 401K (3) BNFL IRA (3)	Also Used In	Replicate Remove Replicate Remove Replicate Remove Replicate Remove
Incomes	Also Used In	VAdd Account Common Replicate New
Wages (4) SS (4) Pension (4)		Replicate Remove Replicate Remove Replicate Remove
Target	Also Used In	Add Income Common Replicate New Add Target Common Replicate New
Тах	Also Used In	V 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		
Scenario New Sce Delete Current Scenario Rename Current Scenario To	nario	▼
Create New Scenario As Replicate Current Scenario As Replicate	2Current Scenario As	
Accounts	Also Used In	
Savings (3) ROTH IRA (3) 401K (3) BNFL IRA (3)		Replicate Remove Replicate Remove Replicate Remove
Incomes	Also Used In	Add Account Common Replicate New
Wages (4) SS (4) SS (4) Pension (4)		Replicate Remove Replicate Remove Replicate Remove
Target	Also Used In	Add Income Common Replicate New Add Target Common Replicate New
Tax	Also Used In	✓ Add Tax Common Replicate New
SIPS References Planning System		PRIVACY POLICY TERMS OF USE

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

		YOUR CASE LIST SETTINGS HELP SIG	N OUT
Manage Scenar	io		
Save Cancel			
Scenario Delete Current Scenario	New Scenario	v	
Rename Current Scenario To			
Create New Scenario As Replicate Current Scenario As			
Accounts	Also Used In		
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401K (3) BNFL IRA (3)		Replicate Remove	
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Target	Also Used In		
		V Add Target Common Replicate N	ew
Tax	Also Used In	V Add Tax Common Replicate N	BW
SIPS Retrement Planning System		PRIVACY POLICY TERMS O	F 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 Scenal Save Cancel	rio	
Scenario	Replicate Current Scenario As	× •
Delete Current Scenario Rename Current Scenario To		
Create New Scenario As Replicate Current Scenario As		
Accounts	Also Used In	
Savings (6) ROTH IRA (6) 401K (6) BNFL IRA (6)		Replicate Remove Replicate Remove Replicate Remove Replicate Remove Replicate Remove
Incomes	Also Used In	Add Account Common Replicate New
Wages (7) SS (7) Pension (7)		Replicate Remove Replicate Remove Replicate Remove
Target	Also Used In	V Add Income Common Replicate New
Target	AISO USED III	V Add Target Common Replicate New
Tax	Also Used In	Add Tax Common Replicate New
SIPS Retirement Planning System		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 O
Manage Scenal	rio		
Scenario Delete Current Scenario Rename Current Scenario To	Replicate Current Scenario As	~	
Create New Scenario As Replicate Current Scenario As			
Ac counts Savings (6) ACTH IRA (6) ACTH IRA (6) ACTH IRA (6) ACTH IRA (6)	Also Used In		Replicate Remove Replicate Remove Replicate Remove Replicate Remove
Incomes	Also Used In		Add Account Common Replicate New
Image: Wages (7) Images (7) Images (7) <td></td> <td></td> <td>Replicate Remove Replicate Remove Replicate Remove</td>			Replicate Remove Replicate Remove Replicate Remove
Target	Also Used In		Add Income Common Replicate New Add Target Common Replicate New
Тах	Also Used In		V Add Tax Common Replicate New
SIPS Retrement Planning System			PRIVACY POLICY TERMS OF U:

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

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LIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCAT	TON AND NET	WORTH G	RAPHS F	EPORTS	TOOLS			REV	ISED PLAN DATE:	
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lorizon	16 years ∨	Savi	ngs (6)	ROTH	I IRA (6)	40	1K (6)	BNFI	L IRA (6)								
											Discost			ГЛ	Track		
Year		Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	SS	Pension	Total Income	Year	
net return	55	1.00 %		4.00 %		6.00 %	IRA	6.00 %	bIRA	Total	Distribution	muges (7)		(7)	meonie		
initial amount	- 55	30,000		4.00 %		630,000	IRA	900.000	DIRA	1.660.000	Subtotal	Manage	Manage	Manage			
bonus %		0.00 %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			
w/bonus		30,000	Manage	100,000	Manage	630,000	Manage	900,000	Manage	1,660,000	incomes	2.20 %	3.20 %	3.20 %			
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 end of 4	58 59	30,909	0	112,486	0	750,340	0	1,071,914	0	1,965,650 2,079,793	0	156,673	0	0	156,673	end of 3 end of 4	
end of 4 end of 5	59 60	31,218 31,530	0	116,986 121,665	0	795,360 843,082	0	1,136,229	0	2,079,793		160,119 163,642	0	0	160,119 163,642	end of 4 end of 5	
end of 6	61	31,846	0	126,532	0	893,667	0	1,276,667	0	2,200,080	0	167,242	0	0	167,242	end of 6	
end of 7	62	32,164	0	131,593	ő	947,287	ő	1,353,267	0	2,464,310	o o	170.921	ő	ő	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 end of 13	67 68	33,805 34,143	0	160,103	0	1,267,683	0	1,810,976	0	3,272,566	0	0	24,008	31,951 32,973	55,958 57,749	end of 12 end of 13	
end of 13 end of 14	68	34,143	0	166,507 173,168	0	1,343,744 1,424,368	0	2,034,812	0	3,464,028 3,666,832	0	0	24,776 25,569	32,973	57,749	end of 13 end of 14	
010 01 14	70	34,404	0	180,094	0	1,424,308	0	2,034,812	0	3,881,654	0	0	26,387	35,117	61,504	end of 15	
end of 15	71	35,177	0	187,298	0		0	2,286,314	0	4,109,210	0	0	27,231	36,241	63,472	end of 16	
end of 15 end of 16							0		0		0	1,475,104	173,776	231,270	1,880,151		

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	
CLIENT DASH	HBOARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	worth c	RAPHS R		OOLS				TIAL PLAN DATI ISED PLAN DATI	
Struc	tured I	ncom	e Plan	nina													
Edit Save			d Income A		dd Target	dit or Add So	enario Disp	lay Ontions									
CON Odve	Cancer	Account			du laiget	an or Add Sc		lay options									
Scenario p	Replicate Curren	t Scenario As					~										
Planning	16 years ∨																
Horizon		Savi	ngs (6)	ROTH	I IRA (6)	40	1K (6)	BNFL	IRA (6)								
Yea	1000	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	SS	Pension	Total Income	Year	
net re urr		1.00 %		4.00 %		6.00 %	IRA	6.00 %	bIRA								
initial ar ou bonu %		30,000 0.00 %		100,000 0.00 %		630,000 0.00 %		900,000		1,660,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor			
w/borus		30,000	Manage	100,000	Manage	630,000	Manage	900,000	Manage	1,660,000	incomes	2.20 %	3.20 %	3.20 %			
end c 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 c 2		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	
end c 3 end c 4	59	30,909 31,218	0	112,486 116,986	0	750,340 795,360	0	1,071,914 1,136,229	0	1,965,650 2,079,793	0	156,673 160,119	0	0	156,673 160,119	end of 3 end of 4	
end c 5		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 c 6		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 c 7		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 c 8		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 c 9		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 end of 11		33,139 33,470	0	148,024 153,945	0	1,128,233	0	1,611,762	0	2,921,158 3,091,810	0	0	22,542 23,263	30,000 30,960	52,542 54,223	end of 10 end of 11	
end of 12		33,470	0	160,103	0	1,195,927	0	1,708,468	0	3,091,810	0	0	23,263	30,960	55,958	end of 11 end of 12	
end of 13		34,143	o	166,507	o	1,343,744	0	1,919,634	0	3,464.028	0	0	24,000	32,973	57,749	end of 13	
end of 14		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		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	5 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		
	e backgrounds ir	idicate hypothe	etical returns														
SIPS	5															PRIVACY P	OLICY TERMS OF USE
Retiremen Planning S	lystem																

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 subheading.

NT DASHBO	ARD STRI	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	WORTH G	RAPHS F	EPORTS	TOOLS				PREPARED BY TIAL PLAN DATE ISED PLAN DATE	
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ario Repl	licate Current	Scenario As					\sim										
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on	16 years ∨	Savi	ngs (6)	ROTH	IRA (6)	40	1K (6)	BNFL	IRA (6)								
			5.(7									_					
Year	1000	Account	Income	Account	Income	Account	Income	Account	Income	Accounts	Planned		SS	Pension	Total	Year	
										Total	Distribution	Wages (7)		(7)	Income		
et return al amount	55	1.00 %		4.00 %		6.00 %	IRA	6.00 % 900.000	bIRA	1 660 000	Subtotal						
onus %		30,000 0.00 %		100,000 0.00 %		630,000 0.00 %		0.00 %		1,660,000	of account	Infl Factor	Infl Factor	Infl Factor			
/bonus		30,000		100,000		630,000		900,000		1,660,000	incomes	2.20 %	3.20 %	3.20 %			
nd 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	
nd 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	
nd of 3	58 59	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	
nd of 4 nd of 5	59 60	31,218 31,530	0	116,986 121,665	0	795,360 843,082	0	1,136,229	0	2,079,793 2,200,680	0	160,119 163,642	0	0	160,119 163,642	end of 4 end of 5	
nd 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	
nd 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	
nd 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	
nd 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	
d of 10	65 66	33,139 33,470	0	148,024 153,945	0	1,128,233	0	1,611,762	0	2,921,158 3,091,810	0	0	22,542 23,263	30,000 30,960	52,542 54,223	end of 10 end of 11	
d of 11	67	33,470	0	160,103	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	
d of 13	68	34,143	0	166,507	0	1,343,744	0	1,919,634	0	3,464,028	Ő	Ő	24,776	32,973	57,749	end of 13	
d 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	
d 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	
nd of 16	71	35,177	0	187,298	0	1,600,420	0	2,286,314	0	4,109,210	0	0	27,231 173,776	36,241 231,270	63,472 1,880,151	end of 16	
			U		0		0		U		0	1,475,104	1/3,//6	231,270	1,880,151		

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	1
CLIENT DASHBOAF	RD I STRU	CTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A		SSET ALLOCAT	ION AND NET	WORTH I (EPORTS	100LS				TIAL PLAN DATE	
															REV	ISED PLAN DATE	
Structu	red Ir	ncome	e Plar	ning													
Edit Save Car	ncel Add A	ccount Add	Income A	dd Inc Tax	dd Target		enario Disp	lay Options									
Scenario Replic	ate Current S	Scenario As					~										
Planning 1 Horizon	years 🗸	Savir	ngs (6)	ROTH	IRA (6)	40	1K (6)	BNFL	IRA (6)								
Year	-	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned	Wages (7)	SS	Pension	Total	Year	
net return	55	1.00 %		4.00 %		6.00 %	IRA	6.00 %	bIRA	Total	Distribution	Wages (7)		(7)	Income		
initial amount	55	30,000		100,000		630,000	INA	900,000	DIRA	1,660,000	Subtotal	Manage	Manage	Manage			
bonus %		0.00 %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			
w/bonus		30,000	Manage	100,000	Manage	630,000	Manage	900,000	Manage	1,660,000	incomes	2.20 %	3.20 %	3.20 %			
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 end of 3	57 58	30,603 30,909	0	108,160 112,486	0	707,868 750,340	0	1,011,240 1,071,914	0	1,857,871 1,965,650	0	153,300 156,673	0	0	153,300 156,673	end of 2 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 end of 13	67 68	33,805 34,143	0	160,103 166,507	0	1,267,683 1,343,744	0	1,810,976 1,919,634	0	3,272,566 3,464,028		0	24,008 24,776	31,951 32,973	55,958 57,749	end of 12 end of 13	
end of 14	69	34,143	0	173,168	0	1,343,744	0	2.034.812	0	3,464,028		0	25,569	34,028	59,597	end of 13 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 back	kgrounds ind	icate hypothe	etical returns														
SIPS																PRIVACY P	OLICY TERMS OF USE
Retirement Planning System																r intest P	CERT FERMIS OF USE

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.

LIENT DASHBO	DARD STRU	UCTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCAT	TON AND NET	worth g	RAPHS F	EPORTS 1	TOOLS				PREPARED B TIAL PLAN DAT SED PLAN DAT	E
truct	urad li	ncom	o Plar	nina													-
dit Dynamic		ncom	eria	ming													
Dynamic	L MODE																
cenario Rep	licate Current	Scenario As					~										
lanning	16 years ∨																
lorizon	,	Savi	ngs (6)	ROTH	I IRA (6)	40	IK (6)	BNFL	IRA (6)								
Year		Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	SS	Pension (7)	Total Income	Year	
net return	55	1.00 %		4.00 %		6.00 % 630.000	IRA	6.00 % 900.000	bIRA		0.1						
initial amount bonus %		0.00 %		0.00 %		0.00 %		0.00 %		1,660,000	Subtotal of account	Infl Factor	Infl Factor	Infl Factor			
w/bonus		30,000		100,000		630,000		900,000		1,660,000	incomes	2.20 %	3.20 %	3.20 %			
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 end of 3	57 58	30,603 30,909	0	108,160 112,486	0	707,868 750,340	0	1,011,240	0	1,857,871 1,965,650	0	153,300 156,673	0	0	153,300 156,673	end of 2 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 end of 10	64 65	32,811 33,139	0	142,331 148.024	0	1,064,371 1,128,233	0	1,520,530	0	2,760,043 2,921,158	0	178,525	0 22.542	30,000	178,525 52,542	end of 9 end of 10	
end of 10 end of 11	66	33,470	0	148,024	0	1,126,233	0	1,708,468	0	3,091,810	0	0	23,263	30,000	54,223	end of 10 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		

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or support@planscout.com.