

# Create New Scenario As

09/17/2024 1:32 pm EDT

Within the structured income plan you can create a new scenario by replicating the accounts and incomes from previous scenarios under the create new scenario function.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [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: New Scenario

Planning Horizon: 16 years

Year	Savings (9)		ROTH IRA (9)		401K (9)		BNFL IRA (9)		Accounts Total	Planned Distribution	Wages (10)	SS	Pension (10)	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						
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	0	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor		
w/bonus		30,000		100,000		630,000		900,000	1,660,000		2.20 %	3.20 %	3.20 %		
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	2,760,043	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	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 System

PRIVACY POLICY | TERMS OF USE

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: [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

Year	Savings (9)		ROTH IRA (9)		401K (9)		BNFL IRA (9)		Accounts Total	Planned Distribution	Wages (10)	SS (10)	Pension (10)	Total Income	Year
	Account	Income	Account	Income	Account	Income	Account	Income							
net return	55	1.00 %		4.00 %		6.00 %		6.00 %	1,660,000	0					
initial amount		30,000		100,000		630,000		900,000	1,660,000	0					
bonus %		0.00 %		0.00 %		0.00 %		0.00 %							
w/bonus		30,000		100,000		630,000		900,000	1,660,000	0					
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	707,658	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	750,490	0	1,071,914	1,965,850	0	156,673	0	0	156,673	end of 3
end of 4	59	31,218	0	116,986	0	795,330	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	843,322	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	2,760,043	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	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	23,263	30,960	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

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Step 3: Create New Scenario As: Click in the text box next to the green button titled Create New Scenario As.

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 Also Used In

- Savings (9) [Replicate] [Remove]
- ROTH IRA (9) [Replicate] [Remove]
- 401K (9) [Replicate] [Remove]
- BNFL IRA (9) [Replicate] [Remove]

Add Account Common Replicate New

Incomes Also Used In

- Wages (10) [Replicate] [Remove]
- SS (10) [Replicate] [Remove]
- Pension (10) [Replicate] [Remove]

Add Income Common Replicate New

Target Also Used In

Add Target Common Replicate New

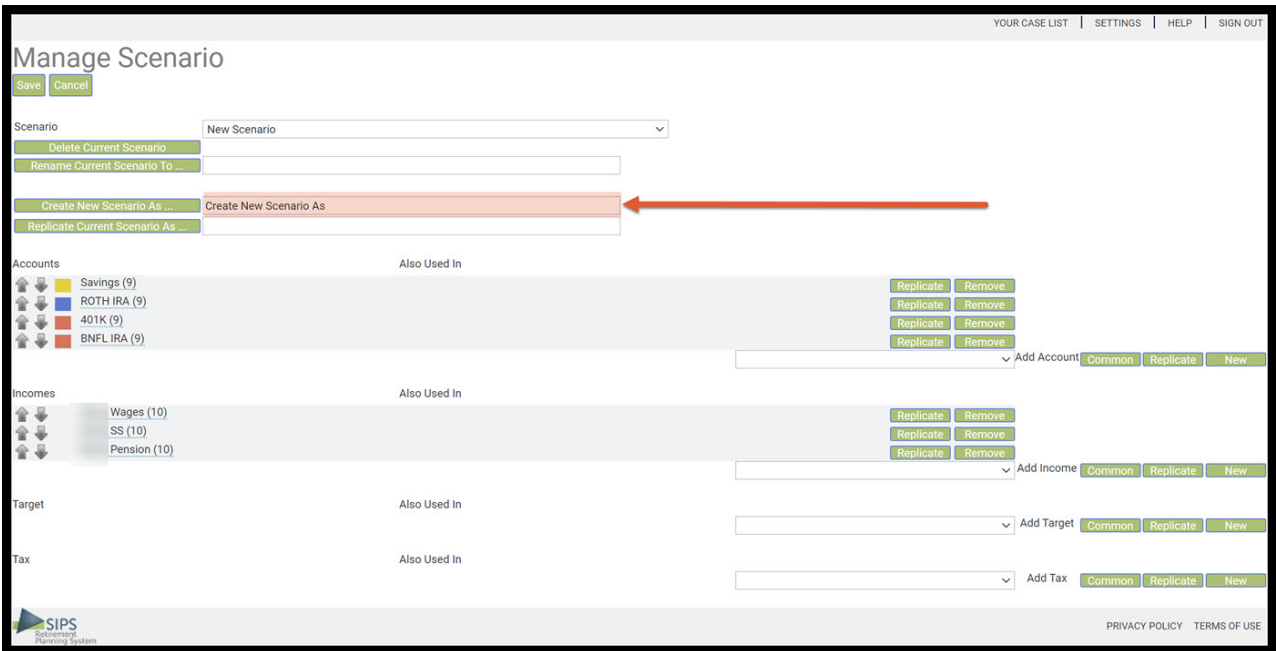
Tax Also Used In

Add Tax Common Replicate New

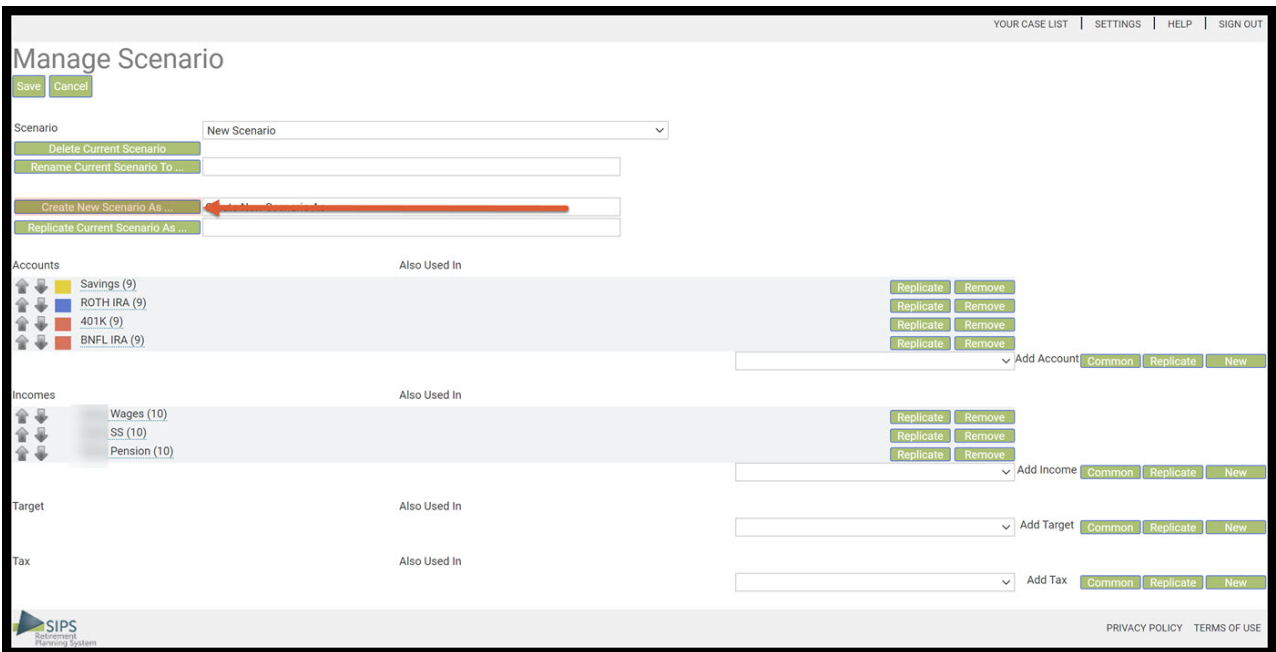
SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

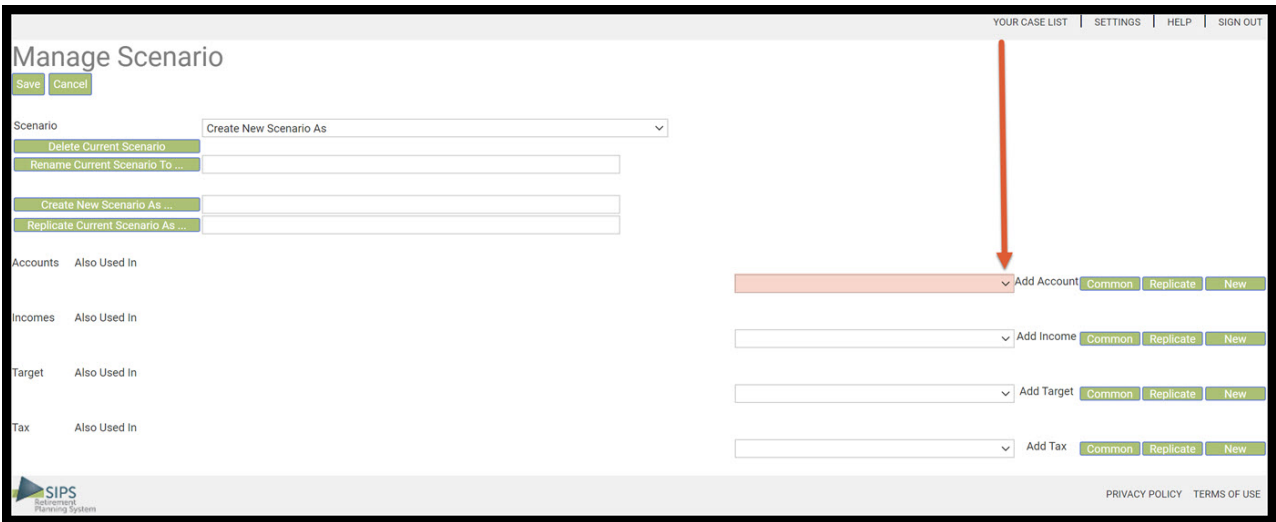
Step 4: Edit the Text Box: Delete default name and type in the new title for the current scenario.



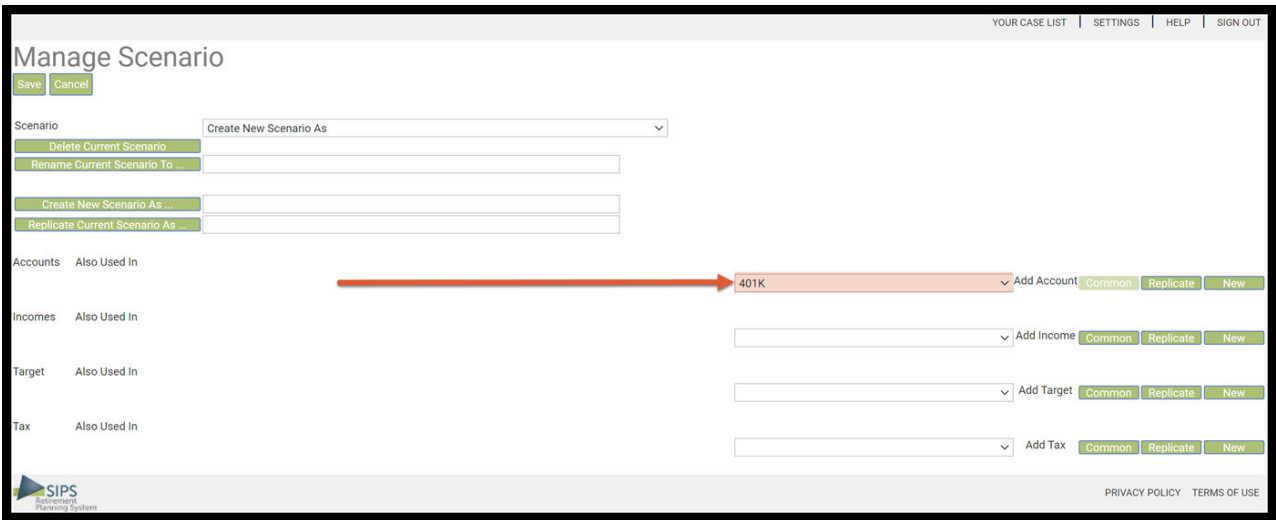
Step 5: Clicking: Double click on the green Rename Current Scenario to button located next to the text box.



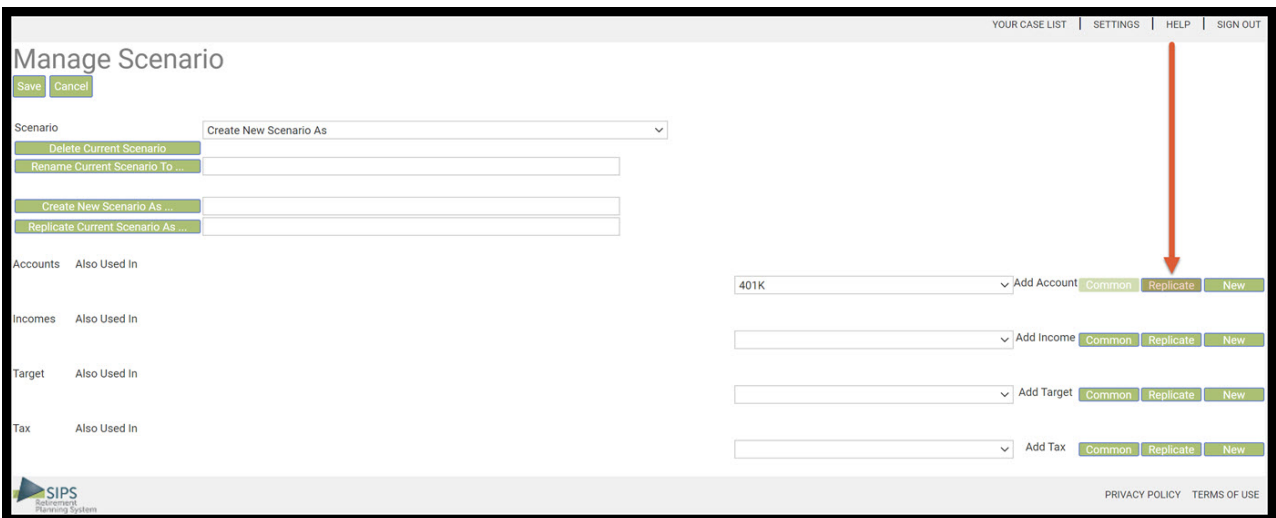
Step 6: Accounts Drop Down Carrot Arrow: Click on the drop-down carrot arrow in the text box located in the accounts section.



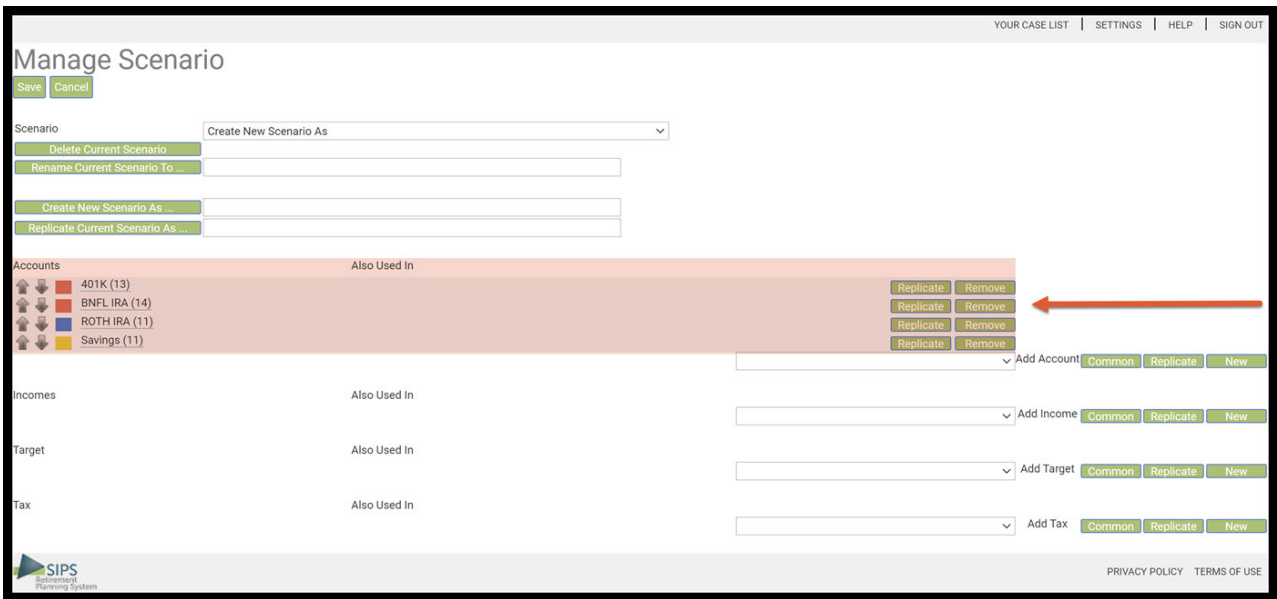
Step 7: Account: Select which account you would like to replicate.



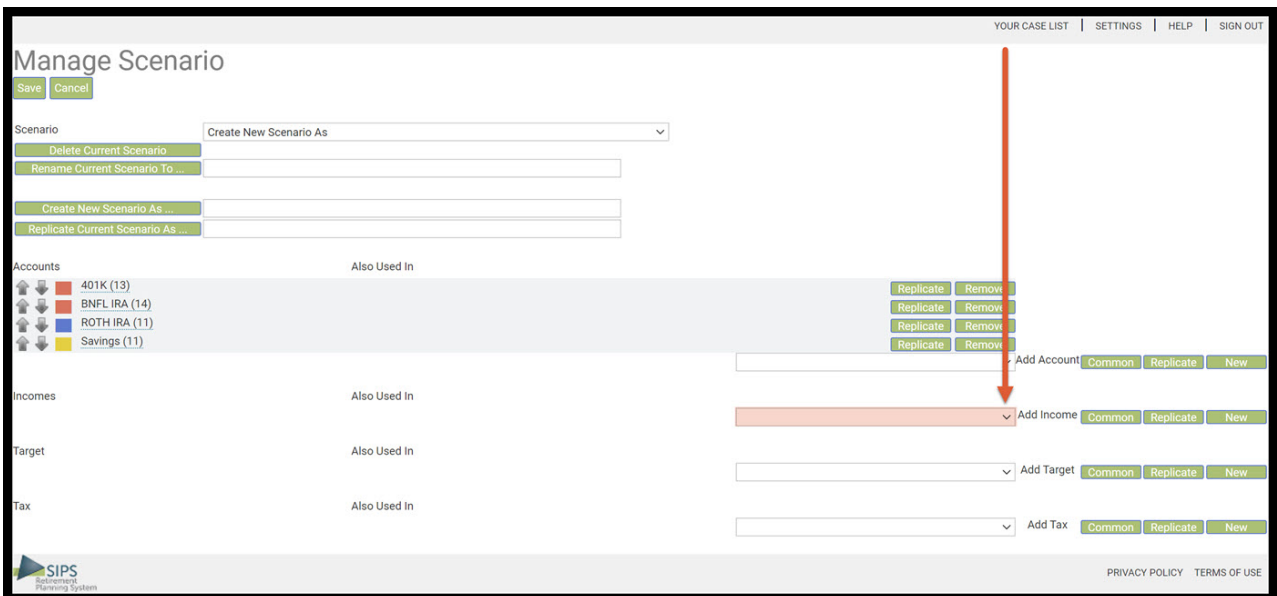
Step 8: Replicate: Click on the green replicate button on the righthand side of the screen.



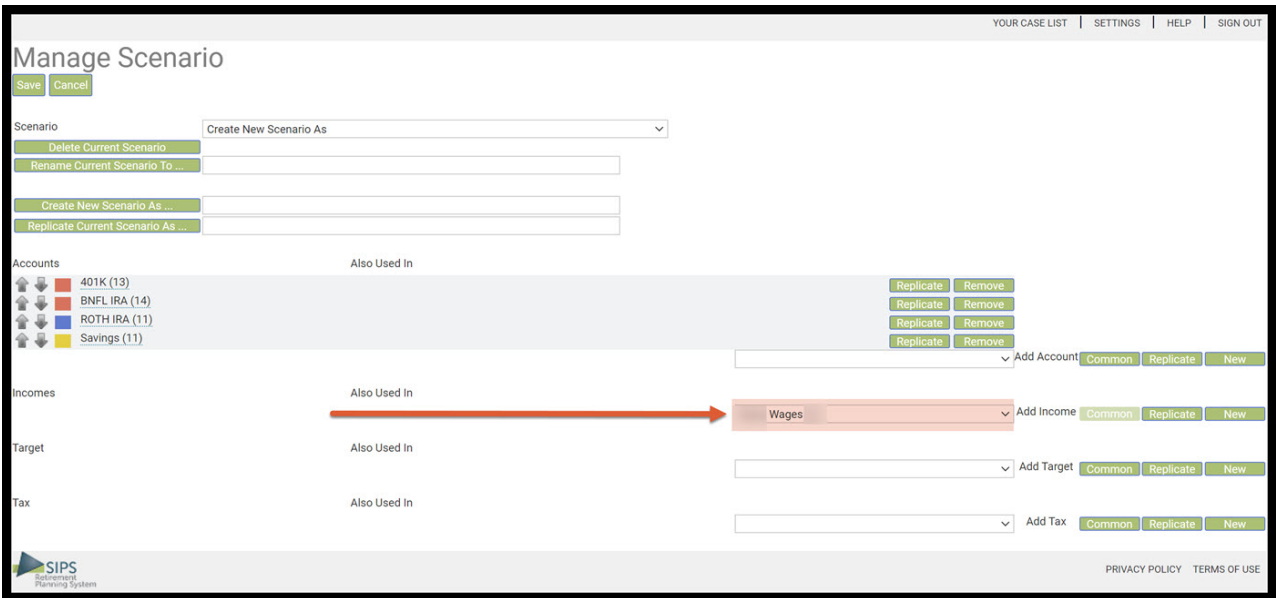
Step 9: Repeat: Repeat until all accounts have been replicated.



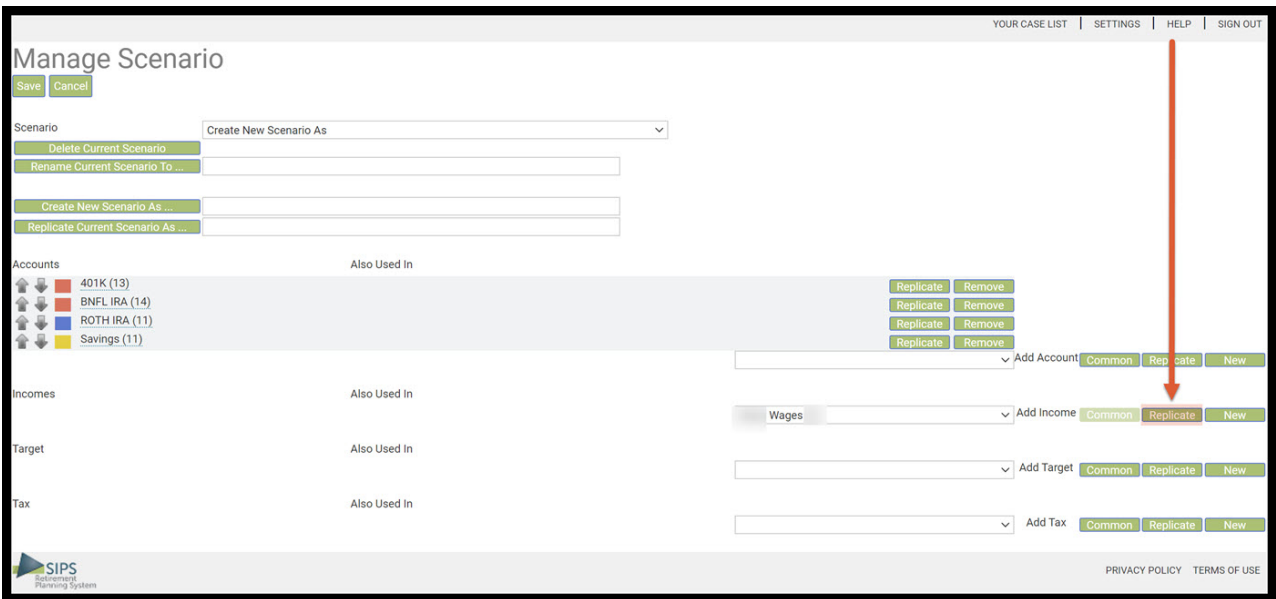
Step 10: Incomes Drop Down Carrot Arrow: Click on the drop-down carrot arrow in the text box located in the incomes section.



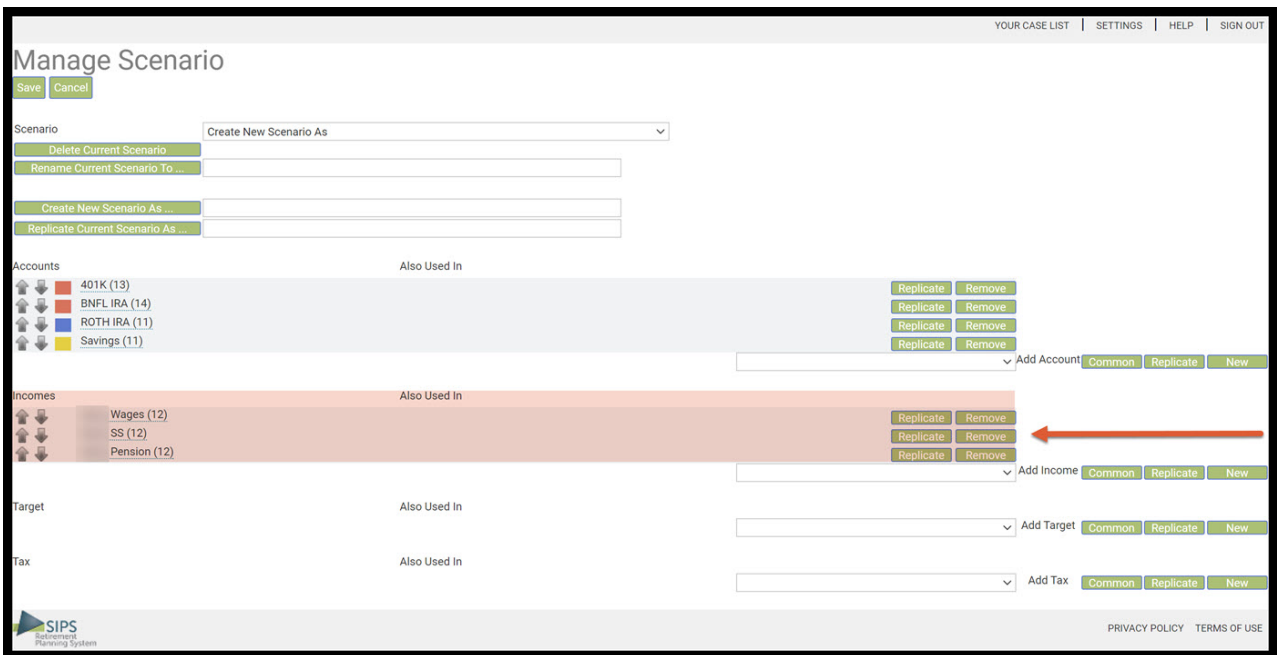
Step 11: Income: Select which income you would like to replicate.



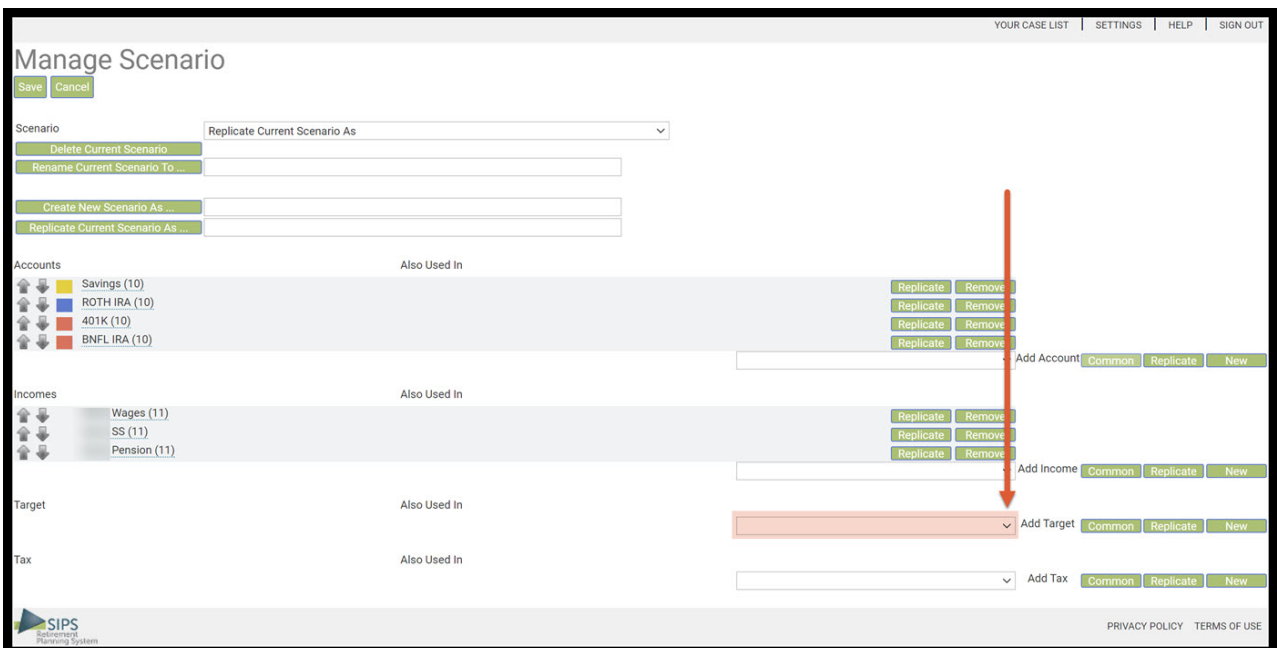
Step 12: Replicate: Click on the green replicate button on the righthand side of the screen.



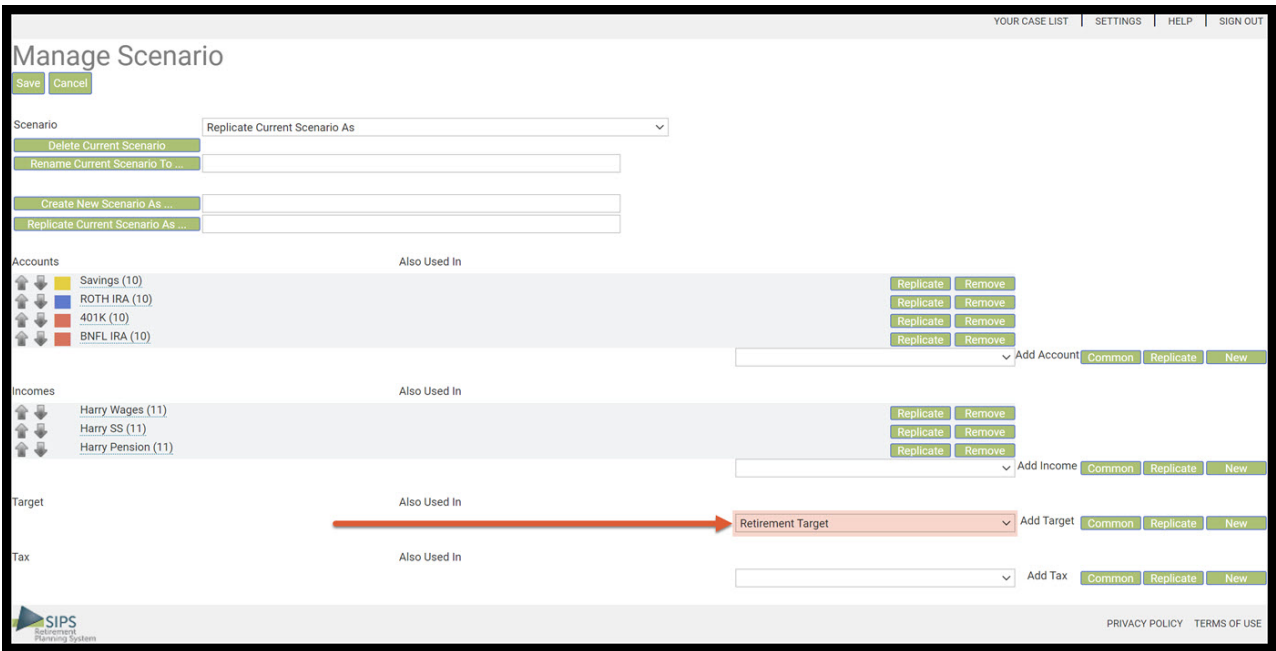
Step 13: Repeat: Repeat until all incomes have been replicated.



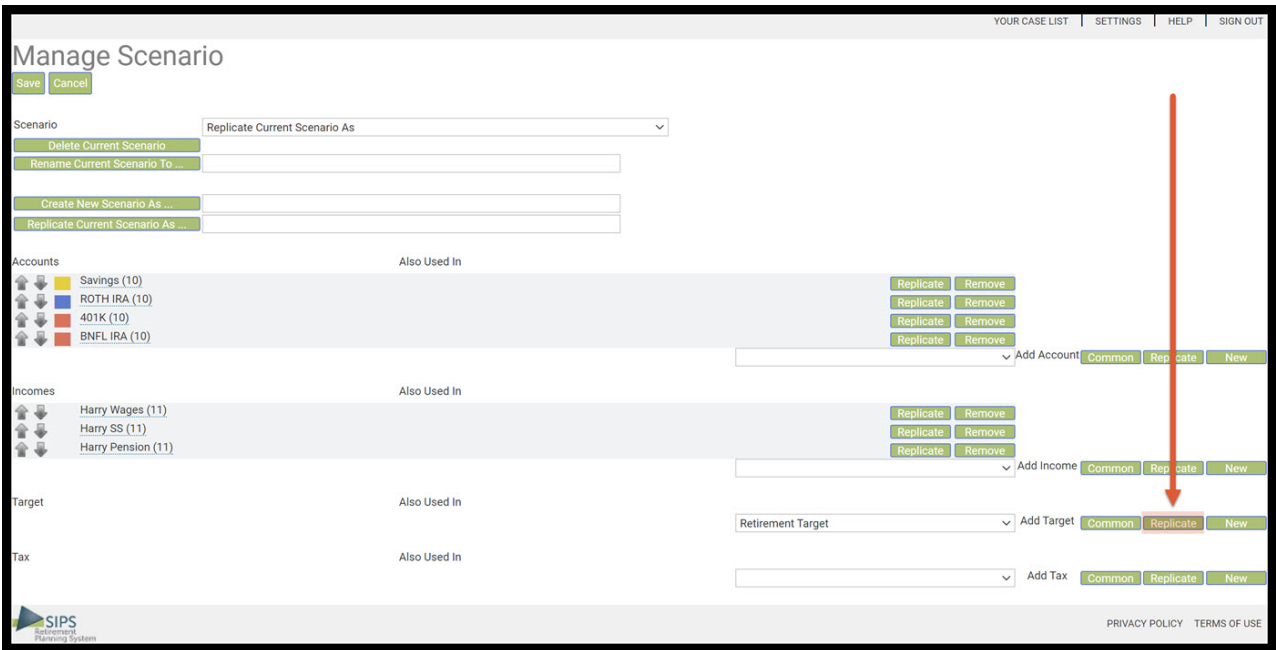
Step 14: Target Drop Down Carrot Arrow: Click on the drop-down carrot arrow in the text box located in the target section.



Step 15: Target: Select which target you would like to replicate.

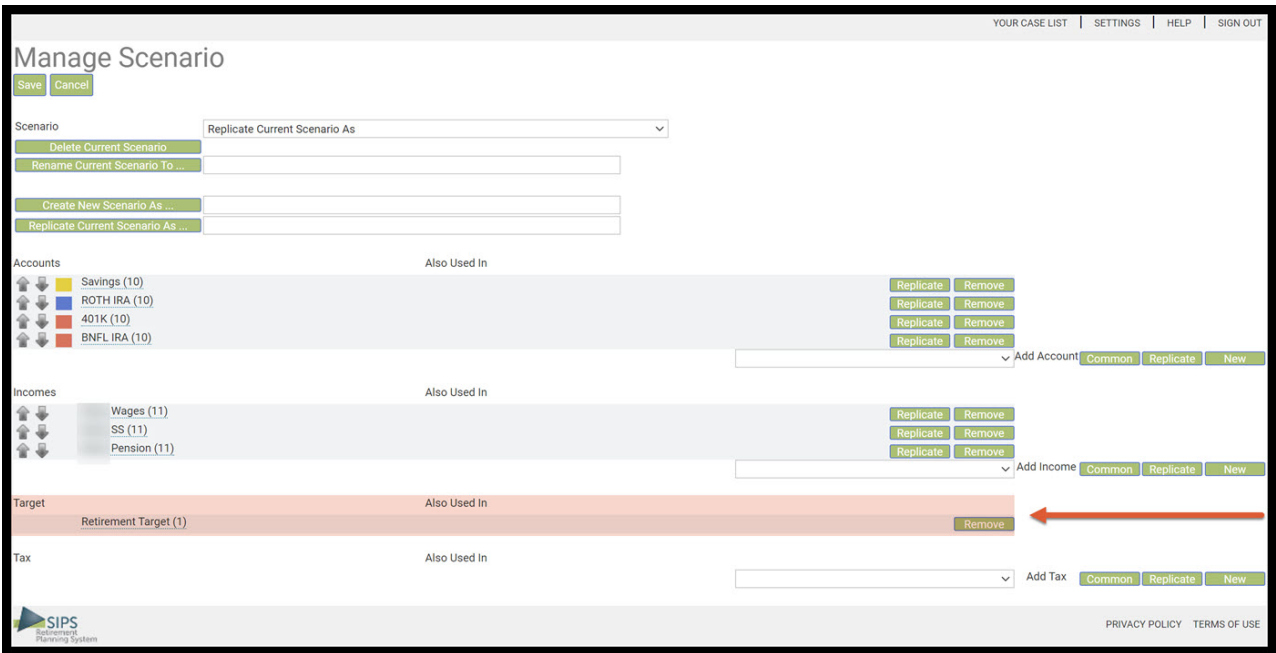


Step 16: Replicate: Click on the green replicate button on the righthand side of the screen.

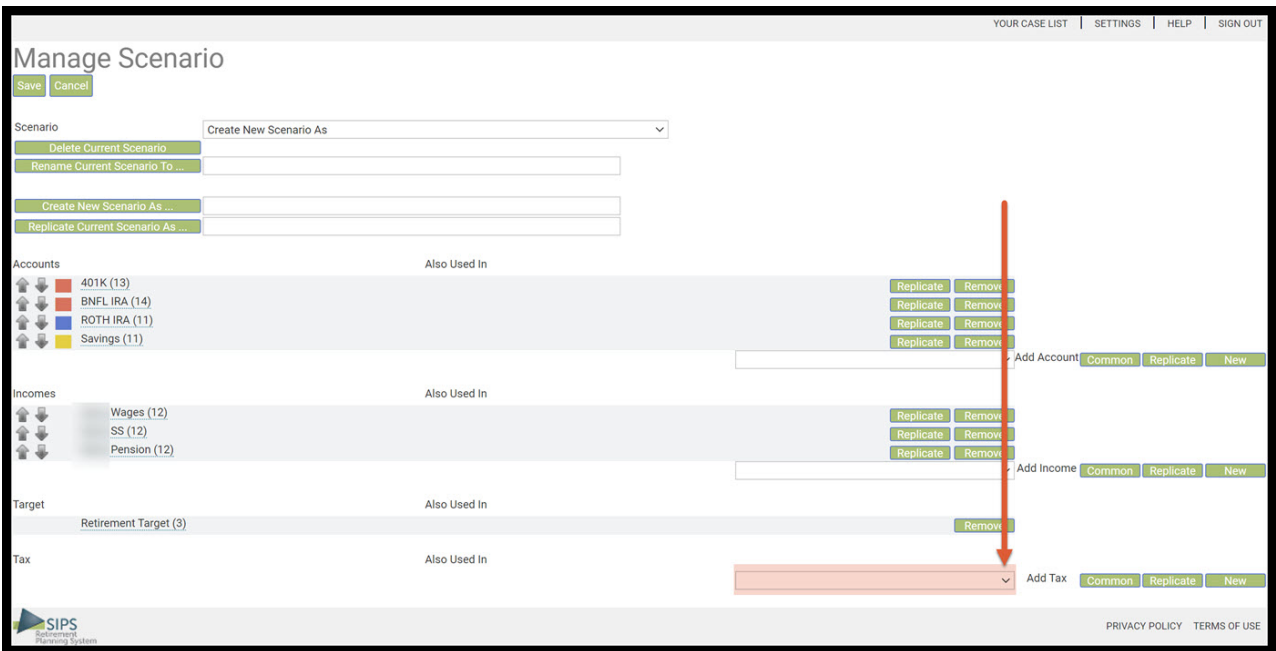


Step 17: Limitations: SIPS will only allow you to select one target income.





Step 18: Tax Drop Down Carrot Arrow: Click on the drop-down carrot arrow in the text box located in the target section.



Step 19: Tax: Select which tax you would like to replicate.

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

401K (13)	Replicate Remove
BNFL IRA (14)	Replicate Remove
ROTH IRA (11)	Replicate Remove
Savings (11)	Replicate Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (12)	Replicate Remove
SS (12)	Replicate Remove
Pension (12)	Replicate Remove

Add Income Common Replicate New

Target Also Used In

Retirement Target (3)	Remove
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Tax Also Used In

Retirement tax	Add Tax Common Replicate New
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SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 20: Replicate: Click on the green replicate button on the righthand side of the screen.

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

401K (13)	Replicate Remove
BNFL IRA (14)	Replicate Remove
ROTH IRA (11)	Replicate Remove
Savings (11)	Replicate Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (12)	Replicate Remove
SS (12)	Replicate Remove
Pension (12)	Replicate Remove

Add Income Common Replicate New

Target Also Used In

Retirement Target (3)	Remove
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Tax Also Used In

Retirement tax	Add Tax Common Replicate New
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SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 21: Limitations: SIPS will only allow you to select one tax.

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

401K (13)	Replicate	Remove
BNFL IRA (14)	Replicate	Remove
ROTH IRA (11)	Replicate	Remove
Savings (11)	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (12)	Replicate	Remove
SS (12)	Replicate	Remove
Pension (12)	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Retirement Target (3)	Remove
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Tax Also Used In

Retirement tax (1)	Remove
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SIPS Retirement Planning Systems

PRIVACY POLICY TERMS OF USE

Step 22: Save: Click on the green save button underneath the manage scenario subheading.

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

401K (13)	Replicate	Remove
BNFL IRA (14)	Replicate	Remove
ROTH IRA (11)	Replicate	Remove
Savings (11)	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (12)	Replicate	Remove
SS (12)	Replicate	Remove
Pension (12)	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Retirement Target (3)	Remove
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Tax Also Used In

Retirement tax (1)	Remove
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SIPS Retirement Planning Systems

PRIVACY POLICY TERMS OF USE

Step 23: Structured Income Plan Scenario: In the text box the new scenario 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:

Planning Horizon: 16 years

		401K (13)		BNFL IRA (14)		ROTH IRA (11)		Savings (11)												
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (12)	SS (12)	Pension (12)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return	55	6.00 %		6.00 %		4.00 %		1.00 %	1,660,000											
initial amount		630,000	900,000	100,000	30,000	1,660,000														
bonus %		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %														
w/ bonus		630,000	900,000	100,000	30,000	1,660,000														
end of 1	56	667,800	954,000	104,000	30,300	1,756,100					150,000			(3,000)	147,000		147,000	end of 1		
end of 2	57	707,868	1,011,240	108,160	30,603	1,857,871					153,300			(3,066)	150,234		150,234	end of 2		
end of 3	58	750,340	1,071,914	112,486	30,909	1,965,650					156,673			(3,133)	153,539		153,539	end of 3		
end of 4	59	795,360	1,136,229	116,986	31,218	2,079,793					160,119			(3,202)	156,917		156,917	end of 4		
end of 5	60	843,082	1,204,403	121,665	31,530	2,200,680					163,642			(3,273)	160,369		160,369	end of 5		
end of 6	61	893,667	1,276,667	126,532	31,846	2,328,711					167,242			(3,345)	163,897		163,897	end of 6		
end of 7	62	947,287	1,353,267	131,593	32,164	2,464,310					170,921			(3,418)	167,503		167,503	end of 7		
end of 8	63	1,004,124	1,434,462	136,857	32,486	2,607,929					174,682			(3,494)	171,188		171,188	end of 8		
end of 9	64	1,064,371	1,520,530	142,331	32,811	2,760,043					178,525			(3,570)	174,954		174,954	end of 9		
end of 10	65	1,128,233	1,611,762	148,024	33,139	2,921,158					182,452	22,542	30,000	(4,700)	230,294	150,000	80,294	end of 10		
end of 11	66	1,195,927	1,708,468	153,945	33,470	3,091,810					186,466	23,263	30,960	(4,814)	235,876	150,000	85,876	end of 11		
end of 12	67	1,267,683	1,810,976	160,103	33,805	3,272,566					190,568	24,008	31,951	(4,931)	241,596	150,000	91,596	end of 12		
end of 13	68	1,343,744	1,919,634	166,507	34,143	3,464,028					194,761	24,776	32,973	(5,050)	247,460	150,000	97,460	end of 13		
end of 14	69	1,424,368	2,034,812	173,168	34,484	3,666,832					199,046	25,569	34,028	(5,173)	253,470	150,000	103,470	end of 14		
end of 15	70	1,509,830	2,156,900	180,094	34,829	3,881,654					203,425	26,387	35,117	(5,299)	259,630	150,000	109,630	end of 15		
end of 16	71	1,600,420	2,286,314	187,298	35,177	4,109,210					207,900	27,231	36,241	(5,427)	265,945	150,000	115,945	end of 16		
											2,839,722	173,776	231,270	(64,895)	3,179,874	1,050,000	2,129,874			

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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Step 24: 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:

Planning Horizon: 16 years

		401K (13)		BNFL IRA (14)		ROTH IRA (11)		Savings (11)												
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (12)	SS (12)	Pension (12)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return	55	6.00 %		6.00 %		4.00 %		1.00 %	1,660,000											
initial amount		630,000	900,000	100,000	30,000	1,660,000														
bonus %		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %														
w/ bonus		630,000	900,000	100,000	30,000	1,660,000														
end of 1	56	667,800	954,000	104,000	30,300	1,756,100					150,000			(3,000)	147,000		147,000	end of 1		
end of 2	57	707,868	1,011,240	108,160	30,603	1,857,871					153,300			(3,066)	150,234		150,234	end of 2		
end of 3	58	750,340	1,071,914	112,486	30,909	1,965,650					156,673			(3,133)	153,539		153,539	end of 3		
end of 4	59	795,360	1,136,229	116,986	31,218	2,079,793					160,119			(3,202)	156,917		156,917	end of 4		
end of 5	60	843,082	1,204,403	121,665	31,530	2,200,680					163,642			(3,273)	160,369		160,369	end of 5		
end of 6	61	893,667	1,276,667	126,532	31,846	2,328,711					167,242			(3,345)	163,897		163,897	end of 6		
end of 7	62	947,287	1,353,267	131,593	32,164	2,464,310					170,921			(3,418)	167,503		167,503	end of 7		
end of 8	63	1,004,124	1,434,462	136,857	32,486	2,607,929					174,682			(3,494)	171,188		171,188	end of 8		
end of 9	64	1,064,371	1,520,530	142,331	32,811	2,760,043					178,525			(3,570)	174,954		174,954	end of 9		
end of 10	65	1,128,233	1,611,762	148,024	33,139	2,921,158					182,452	22,542	30,000	(4,700)	230,294	150,000	80,294	end of 10		
end of 11	66	1,195,927	1,708,468	153,945	33,470	3,091,810					186,466	23,263	30,960	(4,814)	235,876	150,000	85,876	end of 11		
end of 12	67	1,267,683	1,810,976	160,103	33,805	3,272,566					190,568	24,008	31,951	(4,931)	241,596	150,000	91,596	end of 12		
end of 13	68	1,343,744	1,919,634	166,507	34,143	3,464,028					194,761	24,776	32,973	(5,050)	247,460	150,000	97,460	end of 13		
end of 14	69	1,424,368	2,034,812	173,168	34,484	3,666,832					199,046	25,569	34,028	(5,173)	253,470	150,000	103,470	end of 14		
end of 15	70	1,509,830	2,156,900	180,094	34,829	3,881,654					203,425	26,387	35,117	(5,299)	259,630	150,000	109,630	end of 15		
end of 16	71	1,600,420	2,286,314	187,298	35,177	4,109,210					207,900	27,231	36,241	(5,427)	265,945	150,000	115,945	end of 16		
											2,839,722	173,776	231,270	(64,895)	3,179,874	1,050,000	2,129,874			

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 25: 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 Create New Scenario As

Planning Horizon 16 years

Year	401K (13)		BNFL IRA (14)		ROTH IRA (11)		Savings (11)		Accounts Total	Planned Distribution	Wages (12)	SS (12)	Pension (12)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income	Account	Income										
net return	55	6.00 %	IRA	6.00 %	bIRA	4.00 %		1.00 %	1,660,000	Subtotal of account incomes	175,100							
initial amount		630,000		900,000		100,000		30,000	0		150,000			(3,000)	147,000		147,000	
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	0		1,857,871			(3,066)	150,234		150,234	
w/bonus		630,000		900,000		100,000		30,000	1,660,000		156,673			(3,133)	153,539		153,539	
end of 1	56	667,800	0	954,000	0	104,000	0	30,300	1,756,100	0	150,000	0	0	(3,000)	147,000	0	147,000	
end of 2	57	707,868	0	1,011,240	0	108,160	0	30,603	1,857,871	0	153,300	0	0	(3,066)	150,234	0	150,234	
end of 3	58	750,340	0	1,071,914	0	112,486	0	30,909	1,965,650	0	156,673	0	0	(3,133)	153,539	0	153,539	
end of 4	59	795,360	0	1,136,229	0	116,986	0	31,218	2,079,793	0	160,119	0	0	(3,202)	156,917	0	156,917	
end of 5	60	843,082	0	1,204,403	0	121,665	0	31,530	2,200,680	0	163,642	0	0	(3,273)	160,369	0	160,369	
end of 6	61	893,667	0	1,276,667	0	126,532	0	31,846	2,328,711	0	167,242	0	0	(3,345)	163,897	0	163,897	
end of 7	62	947,287	0	1,353,267	0	131,593	0	32,164	2,464,310	0	170,921	0	0	(3,418)	167,503	0	167,503	
end of 8	63	1,004,124	0	1,434,462	0	136,857	0	32,486	2,607,929	0	174,682	0	0	(3,494)	171,188	0	171,188	
end of 9	64	1,064,371	0	1,520,530	0	142,331	0	32,811	2,760,043	0	178,525	0	0	(3,570)	174,954	0	174,954	
end of 10	65	1,128,233	0	1,611,762	0	148,024	0	33,139	2,921,158	0	182,452	22,542	30,000	(4,700)	230,294	150,000	80,294	
end of 11	66	1,195,927	0	1,708,468	0	153,945	0	33,470	3,091,810	0	186,466	23,263	30,960	(4,814)	235,876	150,000	85,876	
end of 12	67	1,267,683	0	1,810,976	0	160,103	0	33,805	3,272,566	0	190,568	24,008	31,951	(4,931)	241,596	150,000	91,596	
end of 13	68	1,343,744	0	1,919,634	0	166,507	0	34,143	3,464,028	0	194,761	24,776	32,973	(5,050)	247,460	150,000	97,460	
end of 14	69	1,424,368	0	2,034,812	0	173,168	0	34,484	3,666,832	0	199,046	25,569	34,028	(5,173)	253,470	150,000	103,470	
end of 15	70	1,509,830	0	2,156,900	0	180,094	0	34,829	3,881,654	0	203,425	26,387	35,117	(5,299)	259,630	150,000	109,630	
end of 16	71	1,600,420	0	2,286,314	0	187,298	0	35,177	4,109,210	0	207,900	27,231	36,241	(5,427)	265,945	150,000	115,945	
			0		0		0			0	2,839,722	173,776	231,270	(64,895)	3,179,874	1,050,000	2,129,874	

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

PRIVACY POLICY | TERMS OF USE

Step 26: 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 Inc Tax Add Target Edit or Add Scenario Display Options

Scenario Create New Scenario As

Planning Horizon 16 years

Year	401K (13)		BNFL IRA (14)		ROTH IRA (11)		Savings (11)		Accounts Total	Planned Distribution	Wages (12)	SS (12)	Pension (12)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income	Account	Income										
net return	55	6.00 %	IRA	6.00 %	bIRA	4.00 %		1.00 %	1,660,000	Subtotal of account incomes	175,100							
initial amount		630,000		900,000		100,000		30,000	0		150,000			(3,000)	147,000		147,000	
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	0		1,857,871			(3,066)	150,234		150,234	
w/bonus		630,000	Manage	900,000	Manage	100,000	Manage	30,000	1,660,000		156,673			(3,133)	153,539		153,539	
end of 1	56	667,800	0	954,000	0	104,000	0	30,300	1,756,100	0	150,000	0	0	(3,000)	147,000	0	147,000	
end of 2	57	707,868	0	1,011,240	0	108,160	0	30,603	1,857,871	0	153,300	0	0	(3,066)	150,234	0	150,234	
end of 3	58	750,340	0	1,071,914	0	112,486	0	30,909	1,965,650	0	156,673	0	0	(3,133)	153,539	0	153,539	
end of 4	59	795,360	0	1,136,229	0	116,986	0	31,218	2,079,793	0	160,119	0	0	(3,202)	156,917	0	156,917	
end of 5	60	843,082	0	1,204,403	0	121,665	0	31,530	2,200,680	0	163,642	0	0	(3,273)	160,369	0	160,369	
end of 6	61	893,667	0	1,276,667	0	126,532	0	31,846	2,328,711	0	167,242	0	0	(3,345)	163,897	0	163,897	
end of 7	62	947,287	0	1,353,267	0	131,593	0	32,164	2,464,310	0	170,921	0	0	(3,418)	167,503	0	167,503	
end of 8	63	1,004,124	0	1,434,462	0	136,857	0	32,486	2,607,929	0	174,682	0	0	(3,494)	171,188	0	171,188	
end of 9	64	1,064,371	0	1,520,530	0	142,331	0	32,811	2,760,043	0	178,525	0	0	(3,570)	174,954	0	174,954	
end of 10	65	1,128,233	0	1,611,762	0	148,024	0	33,139	2,921,158	0	182,452	22,542	30,000	(4,700)	230,294	150,000	80,294	
end of 11	66	1,195,927	0	1,708,468	0	153,945	0	33,470	3,091,810	0	186,466	23,263	30,960	(4,814)	235,876	150,000	85,876	
end of 12	67	1,267,683	0	1,810,976	0	160,103	0	33,805	3,272,566	0	190,568	24,008	31,951	(4,931)	241,596	150,000	91,596	
end of 13	68	1,343,744	0	1,919,634	0	166,507	0	34,143	3,464,028	0	194,761	24,776	32,973	(5,050)	247,460	150,000	97,460	
end of 14	69	1,424,368	0	2,034,812	0	173,168	0	34,484	3,666,832	0	199,046	25,569	34,028	(5,173)	253,470	150,000	103,470	
end of 15	70	1,509,830	0	2,156,900	0	180,094	0	34,829	3,881,654	0	203,425	26,387	35,117	(5,299)	259,630	150,000	109,630	
end of 16	71	1,600,420	0	2,286,314	0	187,298	0	35,177	4,109,210	0	207,900	27,231	36,241	(5,427)	265,945	150,000	115,945	
			0		0		0			0	2,839,722	173,776	231,270	(64,895)	3,179,874	1,050,000	2,129,874	

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

PRIVACY POLICY | TERMS OF USE

Step 27: 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: [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: 16 years

Year	401K (13)		BNFL IRA (14)		ROTH IRA (11)		Savings (11)		Accounts Total	Planned Distribution	Wages (12)	SS (12)	Pension (12)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income	Account	Income										
net return	55	6.00 %	IRA	6.00 %	bIRA	4.00 %		1.00 %	1,660,000	0	1,660,000	0	0	0	0	0	0	end of 1
initial amount		630,000	900,000	100,000	30,000	0.00 %	0.00 %	0.00 %	0	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %				from total income to target	end of 1
bonus %		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0									end of 2
w/bonus		630,000	900,000	100,000	30,000	0.00 %	0.00 %	0.00 %	1,660,000									end of 2
end of 1	56	667,800	0	954,000	0	104,000	0	30,300	1,756,100	0	150,000	0	0	(3,000)	147,000	0	147,000	end of 2
end of 2	57	707,868	0	1,011,240	0	108,160	0	30,603	1,857,871	0	153,300	0	0	(3,066)	150,234	0	150,234	end of 3
end of 3	58	750,340	0	1,071,914	0	112,486	0	30,909	1,965,650	0	156,673	0	0	(3,133)	153,539	0	153,539	end of 3
end of 4	59	795,360	0	1,136,229	0	116,986	0	31,218	2,079,793	0	160,119	0	0	(3,202)	156,917	0	156,917	end of 4
end of 5	60	843,082	0	1,204,403	0	121,665	0	31,530	2,200,680	0	163,642	0	0	(3,273)	160,369	0	160,369	end of 4
end of 6	61	893,667	0	1,276,667	0	126,532	0	31,846	2,328,711	0	167,242	0	0	(3,345)	163,897	0	163,897	end of 5
end of 7	62	947,287	0	1,353,267	0	131,593	0	32,164	2,464,310	0	170,921	0	0	(3,418)	167,503	0	167,503	end of 6
end of 8	63	1,004,124	0	1,434,462	0	136,857	0	32,486	2,607,929	0	174,682	0	0	(3,494)	171,188	0	171,188	end of 7
end of 9	64	1,064,371	0	1,520,530	0	142,331	0	32,811	2,760,043	0	178,525	0	0	(3,570)	174,954	0	174,954	end of 8
end of 10	65	1,128,233	0	1,611,762	0	148,024	0	33,139	2,921,158	0	182,452	22,542	30,000	(4,700)	230,294	150,000	80,294	end of 9
end of 11	66	1,195,927	0	1,708,468	0	153,945	0	33,470	3,091,810	0	186,466	23,263	30,960	(4,814)	235,876	150,000	85,876	end of 10
end of 12	67	1,267,683	0	1,810,976	0	160,103	0	33,805	3,272,566	0	190,568	24,008	31,951	(4,931)	241,596	150,000	91,596	end of 11
end of 13	68	1,343,744	0	1,919,634	0	166,507	0	34,143	3,464,028	0	194,761	24,776	32,973	(5,050)	247,460	150,000	97,460	end of 12
end of 14	69	1,424,368	0	2,034,812	0	173,168	0	34,484	3,666,832	0	199,046	25,569	34,028	(5,173)	253,470	150,000	103,470	end of 13
end of 15	70	1,509,830	0	2,156,900	0	180,094	0	34,829	3,881,654	0	203,425	26,387	35,117	(5,299)	259,630	150,000	109,630	end of 14
end of 16	71	1,600,420	0	2,286,314	0	187,298	0	35,177	4,109,210	0	207,900	27,231	36,241	(5,427)	265,945	150,000	115,945	end of 15
			0		0		0			0	2,839,722	173,776	231,270	(64,895)	3,179,874	1,050,000	2,129,874	end of 16

Orange backgrounds indicate hypothetical returns

SIPS Structured Income 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: +1-888-449-6917 or [support@planscout.com](mailto:support@planscout.com).