

The New Button Function on the Manage Scenario Page

01/12/2026 11:12 am EST

Under the manage scenario page underneath the edit or add scenario subsection, you can add a new account and income into the structured income plan. Below are the step by step guidelines for adding an account and/or income from the manage scenario page.

Adding an Account:

Step 1: New: Click on the green new button located at the right-hand side of the screen underneath the Accounts subsection.

The screenshot displays the 'Manage Scenario' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the title 'Manage Scenario', there are 'Save' and 'Cancel' buttons. The 'Scenario' dropdown menu is set to 'New Button Function'. Below this, there are buttons for 'Delete Current Scenario', 'Rename Current Scenario To ...', 'Create New Scenario As ...', and 'Replicate Current Scenario As ...'. The 'Accounts' subsection is active, showing a table with columns for 'Accounts' and 'Also Used In'. The table lists 'ROTH IRA (12)' and '401K (14)'. To the right of each account, there are 'Replicate' and 'Remove' buttons. Below the table, there is a section for 'Add Account' with buttons for 'Common', 'Replicate', and 'New'. A red arrow points to the 'New' button. The 'Incomes' subsection is also visible, showing 'Wages (13)' and 'SS (13)' with 'Replicate' and 'Remove' buttons. Below the incomes, there is a section for 'Add Income' with buttons for 'Common', 'Replicate', and 'New'. The 'Target' subsection shows 'Retirement Target (4)' with a 'Remove' button. The 'Tax' subsection shows 'Retirement tax (2)' with a 'Remove' button. At the bottom left, there is a logo for 'SIPS Retirement Planning System'. At the bottom right, there are links for 'PRIVACY POLICY' and 'TERMS OF USE'.

Step 2: Manage Account: Filter in the information for the new account.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

[Save](#) [Cancel](#) [View / Edit Income](#) [View / Edit Death Benefit](#) [View / Edit Actual Values](#)

Account name:

Initial account balance:

Hypothetical return: %

Bonus: %

Optional:

Account description:

Optional account company:

Other:

Tax calculation option:

Add money later - deferred account: ☐

Years deferred:

Asset plan allocation: [Sel](#)

Risk level:

Account owner:

Account type:

Add an income rider

Based on: ☒ age ☐ Client2's age ☐ Joint

Select income rider:

Number of months of payout in first year:

Enter manual payout: ☐

[Request Additional Rider](#) [Remove Income Rider](#)

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) %

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal %

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

[Pick year\(s\)](#)

OR

[Start year for rest of plan](#)

OR

[Start year for X years](#)

[Pick year\(s\) to remove](#)

[Remove year to end of plan](#)

[Reset all years](#)

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

PRIVACY POLICY | TERMS OF USE

Step 3: Save: Click on the green save button underneath the manage account subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

[Save](#) [Cancel](#) [View / Edit Income](#) [View / Edit Death Benefit](#) [View / Edit Actual Values](#)

Account name:

Initial account balance:

Hypothetical return: %

Bonus: %

Optional:

Account description:

Optional account company:

Other:

Tax calculation option:

Add money later - deferred account: ☐

Years deferred:

Asset plan allocation: [Sel](#)

Risk level:

Account owner:

Account type:

Add an income rider

Based on: ☒ age ☐ Client2's age ☐ Joint

Select income rider:

Number of months of payout in first year:

Enter manual payout: ☐

[Request Additional Rider](#) [Remove Income Rider](#)

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) %

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal %

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

[Pick year\(s\)](#)

OR

[Start year for rest of plan](#)

OR

[Start year for X years](#)

[Pick year\(s\) to remove](#)

[Remove year to end of plan](#)

[Reset all years](#)

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
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19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

PRIVACY POLICY | TERMS OF USE

Step 4: Manage Scenario: The new account will be in the list underneath the account section.

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	
ROTH IRA (12)		Replicate Remove
401K (14)		Replicate Remove
Savings Account		Replicate Remove
		<input type="text"/> Add Account Common Replicate New

Incomes	Also Used In	
Wages (13)		Replicate Remove
SS (13)		Replicate Remove
		<input type="text"/> Add Income Common Replicate New

Target	Also Used In	
Retirement Target (4)		Remove

Tax	Also Used In	
Retirement tax (2)		Remove

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Adding an Income:

Step 5: New: Click on the green new button located at the right-hand side of the screen underneath the Incomes subsection.

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	
ROTH IRA (12)		Replicate Remove
401K (14)		Replicate Remove
Savings Account		Replicate Remove
		<input type="text"/> Add Account Common Replicate New

Incomes	Also Used In	
Wages (13)		Replicate Remove
SS (13)		Replicate Remove
		<input type="text"/> Add Income Common Replicate New

Target	Also Used In	
Retirement Target (4)		Remove

Tax	Also Used In	
Retirement tax (2)		Remove

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 6: Manage Income: Filter in the information for the new income.

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save

Cancel

Other income name

This is a Social Security income

☐

First year income

Inflation rate

0.0 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

☒ Client 1 age
 ☐ Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
<input type="checkbox"/> 1	
<input type="checkbox"/> 2	
<input type="checkbox"/> 3	
<input type="checkbox"/> 4	
<input type="checkbox"/> 5	
<input type="checkbox"/> 6	
<input type="checkbox"/> 7	
<input type="checkbox"/> 8	
<input type="checkbox"/> 9	
<input type="checkbox"/> 10	
<input type="checkbox"/> 11	
<input type="checkbox"/> 12	
<input type="checkbox"/> 13	
<input type="checkbox"/> 14	
<input type="checkbox"/> 15	
<input type="checkbox"/> 16	
<input type="checkbox"/> 17	
<input type="checkbox"/> 18	
<input type="checkbox"/> 19	
<input type="checkbox"/> 20	
<input type="checkbox"/> 21	
<input type="checkbox"/> 22	
<input type="checkbox"/> 23	
<input type="checkbox"/> 24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

SIPS

Retirement Planning System

PRIVACY POLICY

TERMS OF USE

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save

Cancel

Other income name

Rental Income

This is a Social Security income

☐

First year income

14,400

Inflation rate

2 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

☒ Client 1 age
 ☐ Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
<input type="checkbox"/> 1	
<input type="checkbox"/> 2	
<input type="checkbox"/> 3	
<input type="checkbox"/> 4	
<input type="checkbox"/> 5	
<input type="checkbox"/> 6	
<input type="checkbox"/> 7	
<input type="checkbox"/> 8	
<input type="checkbox"/> 9	
<input type="checkbox"/> 10	
<input type="checkbox"/> 11	
<input type="checkbox"/> 12	
<input type="checkbox"/> 13	
<input type="checkbox"/> 14	
<input type="checkbox"/> 15	
<input type="checkbox"/> 16	
<input type="checkbox"/> 17	
<input type="checkbox"/> 18	
<input type="checkbox"/> 19	
<input type="checkbox"/> 20	
<input type="checkbox"/> 21	
<input type="checkbox"/> 22	
<input type="checkbox"/> 23	
<input type="checkbox"/> 24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

SIPS

Retirement Planning System

PRIVACY POLICY

TERMS OF USE

Step 8: Manage Scenario: The new income will be in the list underneath the income section.

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	
ROTH IRA (12)		Replicate Remove
401K (14)		Replicate Remove
Savings Account		Replicate Remove
		<input type="text"/> Add Account Common Replicate New

Incomes	Also Used In	
Wages (13)		Replicate Remove
SS (13)		Replicate Remove
Rental Income		Replicate Remove
		<input type="text"/> Add Income Common Replicate New

Target	Also Used In	
Retirement Target (4)		Remove

Tax	Also Used In	
Retirement tax (2)		Remove

SIPS Retirement Planning System

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

Step 9: Save: Click 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	
ROTH IRA (12)		Replicate Remove
401K (14)		Replicate Remove
Savings Account		Replicate Remove
		<input type="text"/> Add Account Common Replicate New

Incomes	Also Used In	
Wages (13)		Replicate Remove
SS (13)		Replicate Remove
Rental Income		Replicate Remove
		<input type="text"/> Add Income Common Replicate New

Target	Also Used In	
Retirement Target (4)		Remove

Tax	Also Used In	
Retirement tax (2)		Remove

SIPS Retirement Planning System

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

Step 10: Structured Income Plan: The new account and income should have new columns in the structured income plan.

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:

Planning Horizon: 16 years

Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %		2.00 %		750,000	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
initial amount		100,000	0	630,000	0	20,000	0	750,000	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
bonus % w/ bonus		0.00 %	0	0.00 %	0	0.00 %	0	0	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11	
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12	
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13	
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14	
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15	
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	0	0	0	0	0	0	end of 15
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	0	0	0	0	0	0	end of 16
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	end of 16

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 11: 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 Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon: 16 years

Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %		2.00 %		750,000	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
initial amount		100,000	0	630,000	0	20,000	0	750,000	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
bonus % w/ bonus		0.00 %	0	0.00 %	0	0.00 %	0	0	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11	
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12	
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13	
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14	
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15	
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	0	0	0	0	0	0	end of 15
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	0	0	0	0	0	0	end of 16
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	end of 16

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 12: 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.

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	ROTH IRA (12)		401K (14)		Savings Account		Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
	Account	Income	Account	Income	Account	Income											
net return	55	4.00 %	6.00 %	IRA	2.00 %		750,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 2.00 %					from total income to target	
initial amount		100,000	630,000		20,000		750,000										
bonus % w/bonus		0.00 %	0.00 %		0.00 %												
end of 1	56	104,000	0	667,800	0	20,400	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1	
end of 2	57	108,160	0	707,868	0	20,808	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2	
end of 3	58	112,486	0	750,340	0	21,224	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3	
end of 4	59	116,986	0	795,360	0	21,649	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4	
end of 5	60	121,665	0	843,082	0	22,082	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5	
end of 6	61	126,532	0	893,667	0	22,523	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6	
end of 7	62	131,593	0	947,287	0	22,974	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7	
end of 8	63	136,857	0	1,004,124	0	23,433	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8	
end of 9	64	142,331	0	1,064,371	0	23,902	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9	
end of 10	65	148,024	0	1,128,233	0	24,380	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10	
end of 11	66	153,945	0	1,195,927	0	24,867	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11	
end of 12	67	160,103	0	1,267,683	0	25,365	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12	
end of 13	68	166,507	0	1,343,744	0	25,872	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13	
end of 14	69	173,168	0	1,424,368	0	26,390	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14	
end of 15	70	180,094	0	1,509,830	0	26,917	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15	
end of 16	71	187,298	0	1,600,420	0	27,456	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16	
			0		0		0		1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 13: 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:

Planning Horizon: 16 years

Year	ROTH IRA (12)		401K (14)		Savings Account		Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income										
net return	55	4.00 %	6.00 %	IRA	2.00 %		750,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 2.00 %					from total income to target
initial amount		100,000	630,000		20,000		750,000									
bonus % w/bonus		0.00 %	0.00 %		0.00 %											
end of 1	56	104,000	0	667,800	0	20,400	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 11	66	153,945	0	1,195,927	0	24,867	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11
end of 12	67	160,103	0	1,267,683	0	25,365	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0		1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 14: 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

EditDynamic Mode

ScenarioNew Button Function

Planning Horizon16 years

ROTH IRA (12)

401K (14)

Savings Account

Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %		2.00 %		750,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 2.00 %					
initial amount		100,000		630,000		20,000		750,000									
bonus % w/bonus		0.00 %		0.00 %		0.00 %											
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11
end of 12	67	160,103	0	1,267,663	0	25,365	0	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0			1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning 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.