

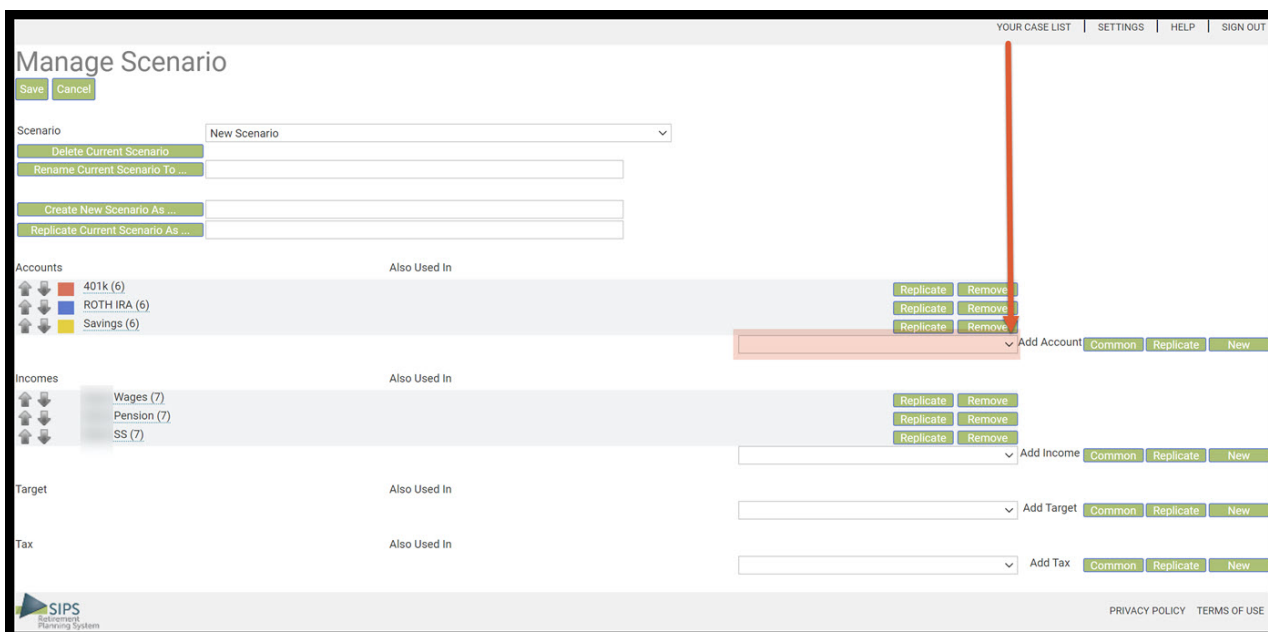
# The Common Button on the Manage Scenario Page

09/17/2024 1:38 pm EDT

The function of the common button on the manage scenario page is to add an existing account, income, target, and/or tax from another scenario into the current scenario you are working in. When you add the new items into the current scenario and you make editing changes to those items, it will only be affected in the scenario you are working in. Below are the step-by-step guideline for adding an existing account, income, target and tax through the Common button.

Adding an account:

Step 1: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add account heading.



Step 2: Selection: Select which account you would like to add.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Scenario

Save Cancel

Scenario

Accounts Also Used In


<input type="button" value="401k (6)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="ROTH IRA (6)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="Savings (6)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="Savings (3)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	<input type="button" value="Add Account"/> <input type="button" value="Common"/> <input type="button" value="Replicate"/> <input type="button" value="New"/>

Incomes Also Used In

<input type="button" value="Wages (7)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="Pension (7)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="SS (7)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="text" value=""/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	<input type="button" value="Add Income"/> <input type="button" value="Common"/> <input type="button" value="Replicate"/> <input type="button" value="New"/>

Target Also Used In

Tax Also Used In

 PRIVACY POLICY | TERMS OF USE

Step 3: Common: Click on the green Common button.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Scenario

Save Cancel

Scenario

Accounts Also Used In


<input type="button" value="401k (6)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="ROTH IRA (6)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="Savings (6)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="Savings (3)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	<input type="button" value="Add Account"/> <input type="button" value="Common"/> <input type="button" value="Replicate"/> <input type="button" value="New"/>

Incomes Also Used In

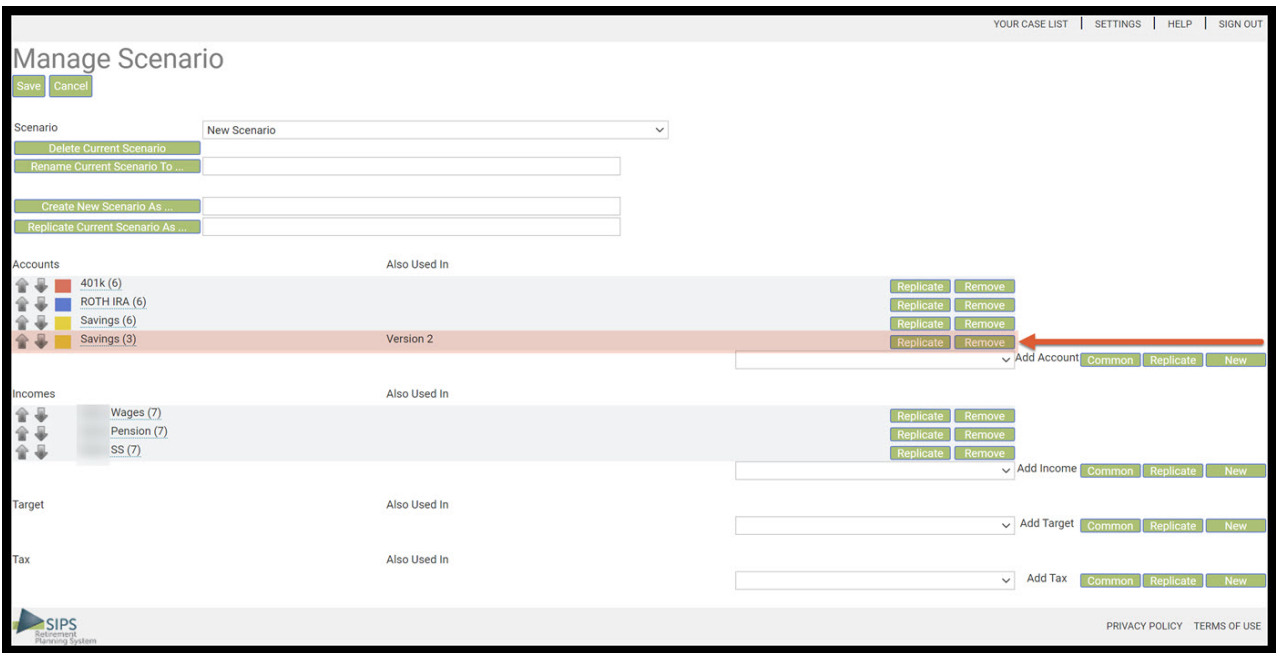
<input type="button" value="Wages (7)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="Pension (7)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="button" value="SS (7)"/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	
<input type="text" value=""/>	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>	<input type="button" value="Add Income"/> <input type="button" value="Common"/> <input type="button" value="Replicate"/> <input type="button" value="New"/>

Target Also Used In

Tax Also Used In

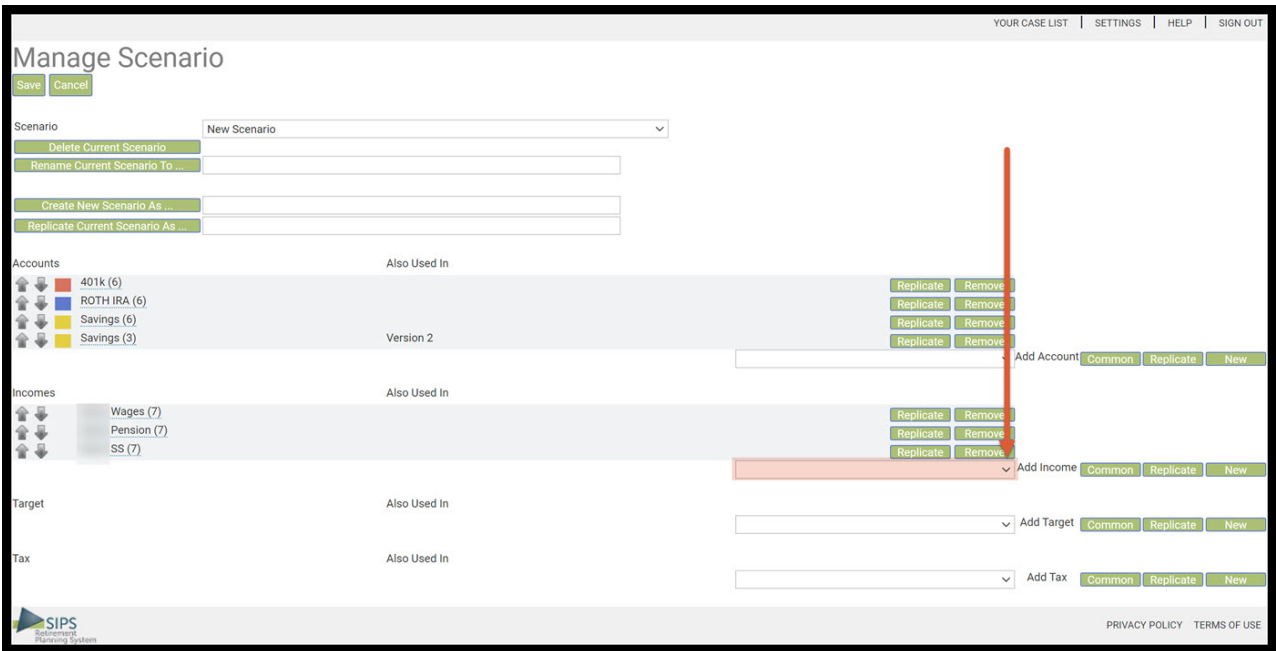
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Step 4: Table: The new account will be shown under the list of account.

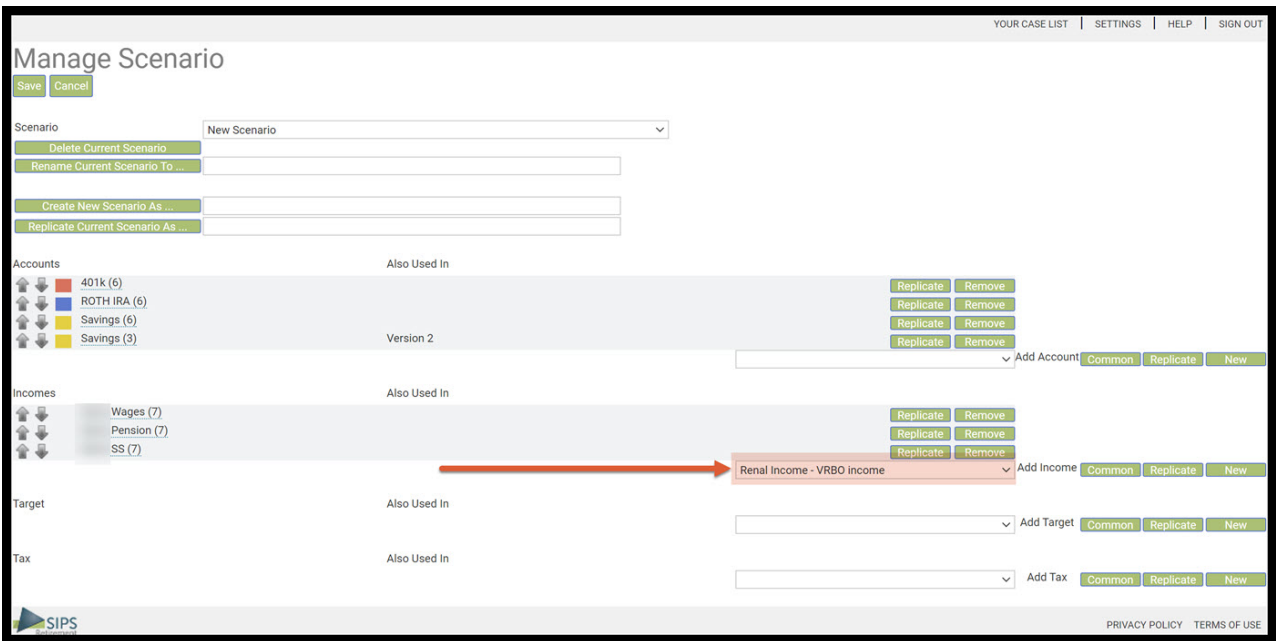


Adding an income:

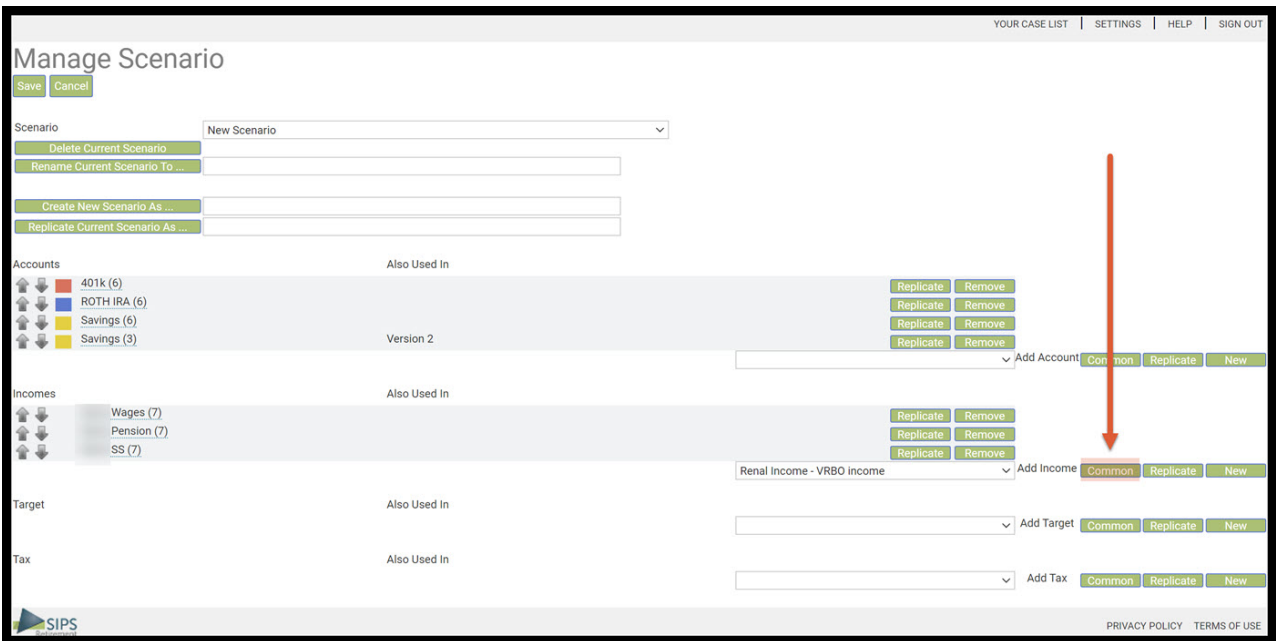
Step 5: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add income heading.



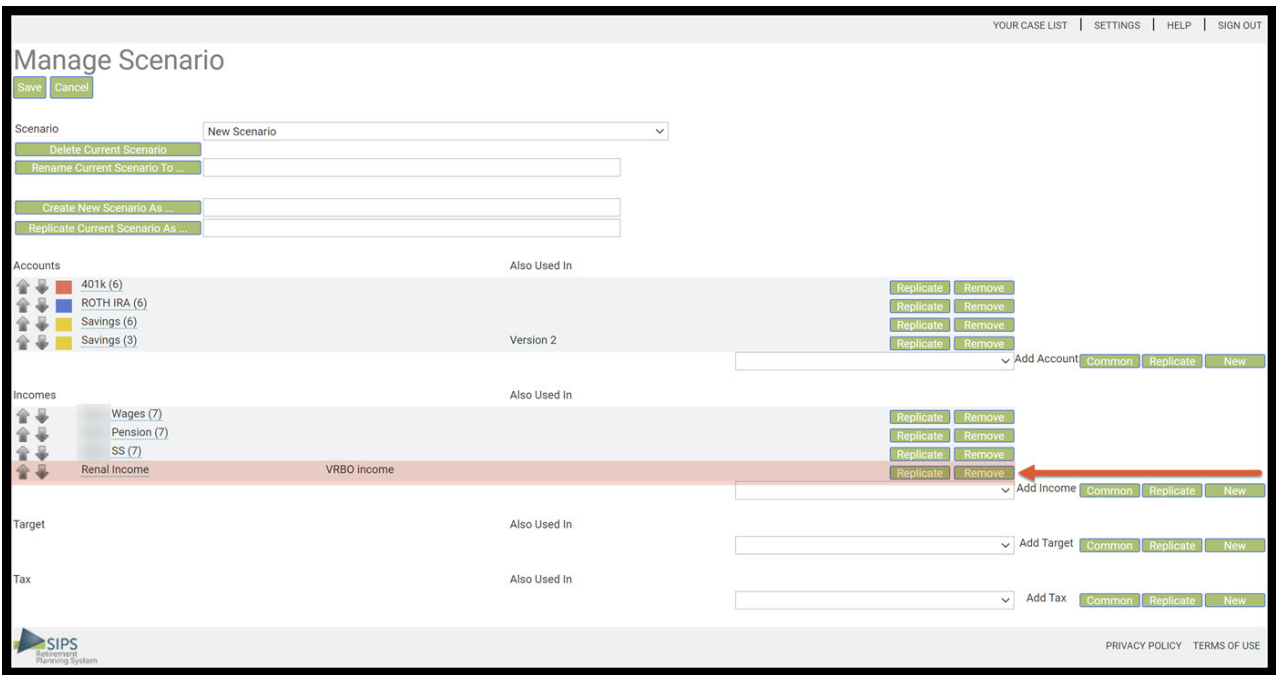
Step 6: Selection: Select which income you would like to add.



Step 7: Common: Click on the green Common button.

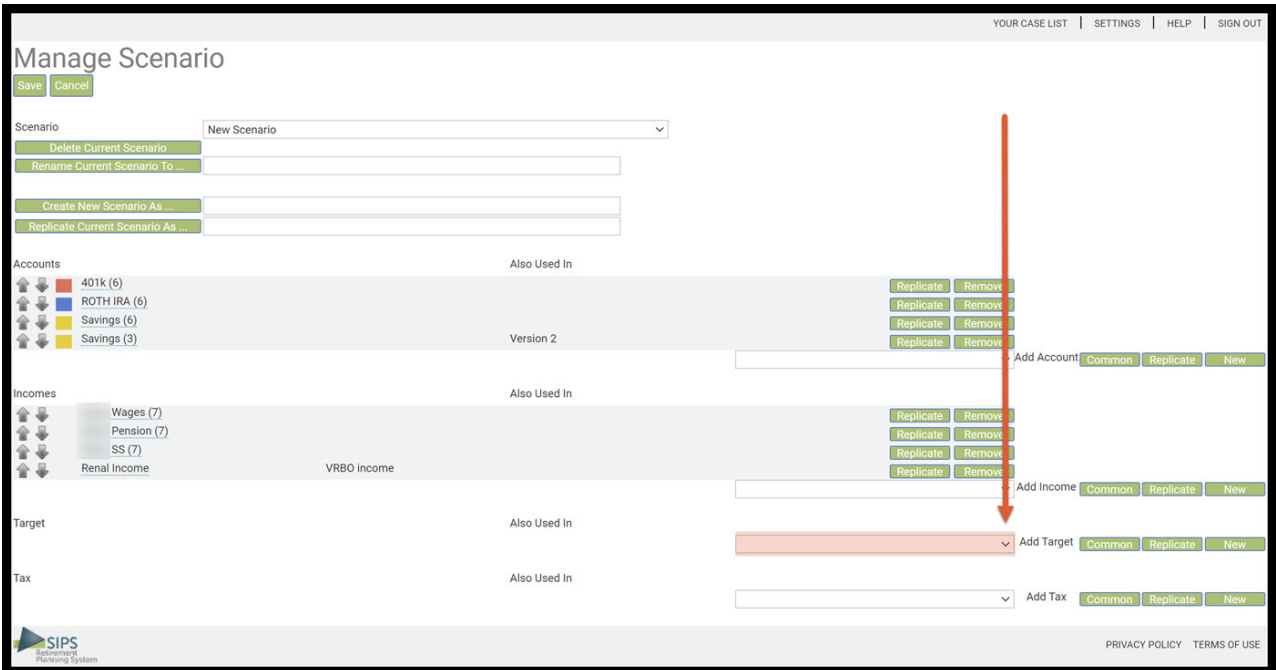


Step 8: Table: The new income will be shown under the list of incomes.



Adding a Target:

Step 9: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add target heading.



Step 10: Selection: Select which target you would like to add.

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 (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)	Version 2	Replicate	Remove

Add Account  Common Replicate New

Incomes Also Used In

Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income	VRBO income	Replicate	Remove

Add Income  Common Replicate New

Target Also Used In

**Version 2** Add Target  Common Replicate New

Tax Also Used In

Add Tax  Common Replicate New

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 11: Common: Click on the green Common button.

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 (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)	Version 2	Replicate	Remove

Add Account  **Common** Replicate New

Incomes Also Used In

Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income	VRBO income	Replicate	Remove

Add Income  Common Replicate New

Target Also Used In

Version 2 Add Target  **Common** Replicate New

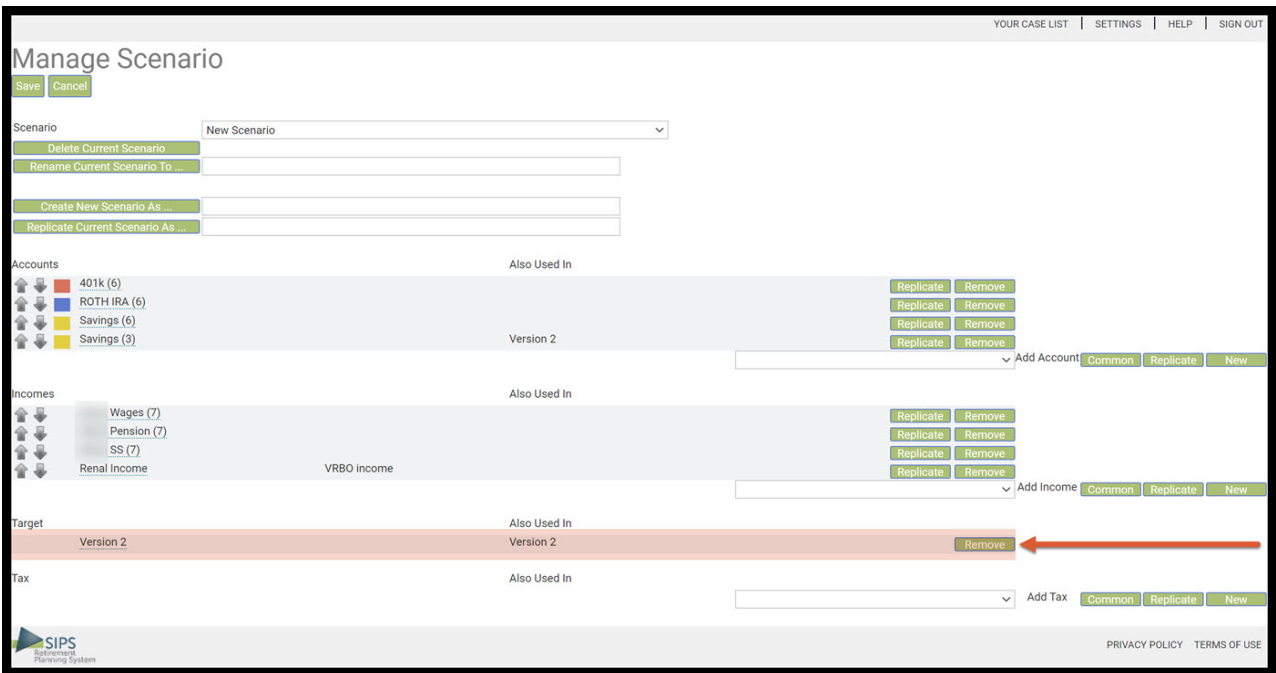
Tax Also Used In

Add Tax  Common Replicate New

SIPS Retirement Planning System

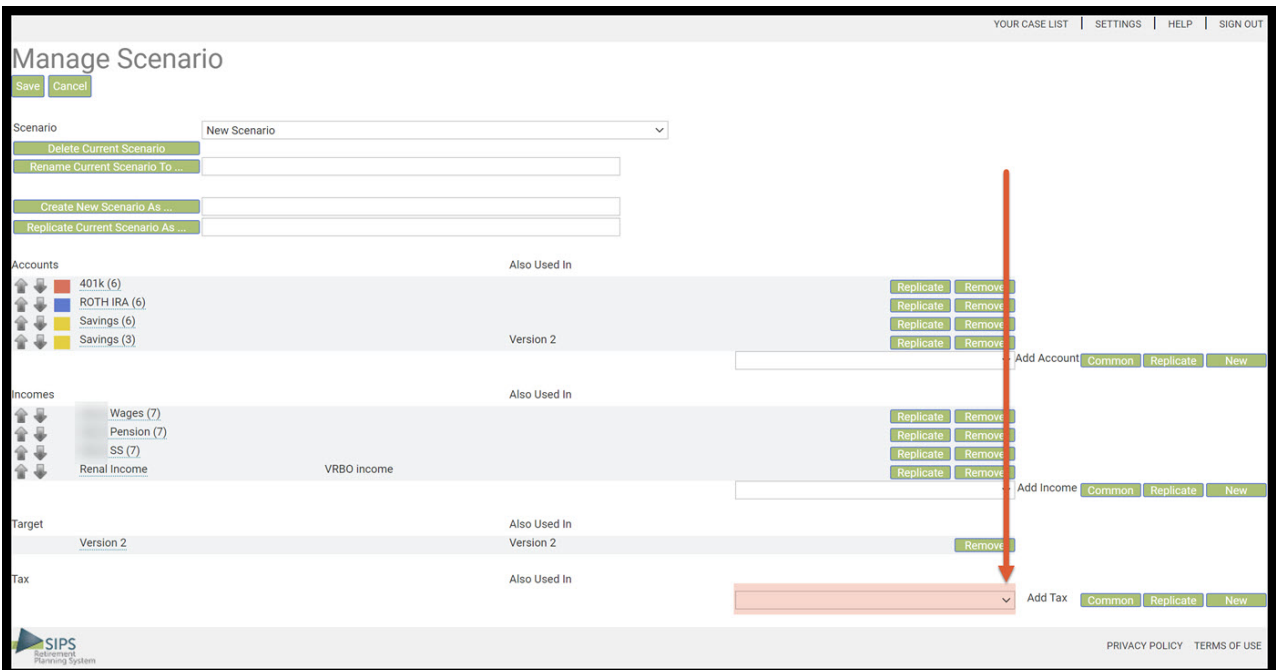
PRIVACY POLICY TERMS OF USE

Step 12: Table: The new target will also show which other scenario the account is being used.



### Adding a Tax:

Step 13: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add tax heading.



Step 14: Selection: Select which tax you would like to add.

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 (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)	Version 2	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
kenal Income	VRBO Income	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Version 2	Version 2	Remove
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Tax Also Used In

	Version 3	Add Tax	<span>Common</span>	<span>Replicate</span>	<span>New</span>
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SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 15: Common: Click on the green Common button.

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 (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)	Version 2	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
kenal Income	VRBO Income	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Version 2	Version 2	Remove
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Tax Also Used In

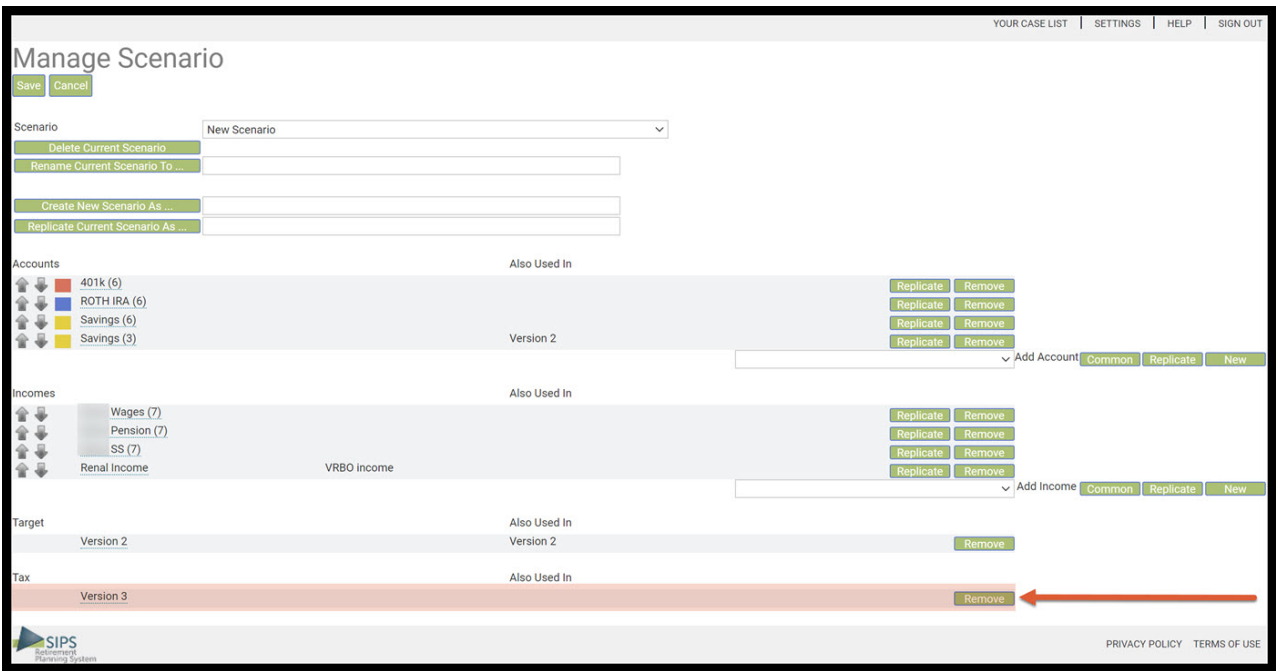
	Version 3	Add Tax	<span>Common</span>	<span>Replicate</span>	<span>New</span>
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SIPS Retirement Planning System

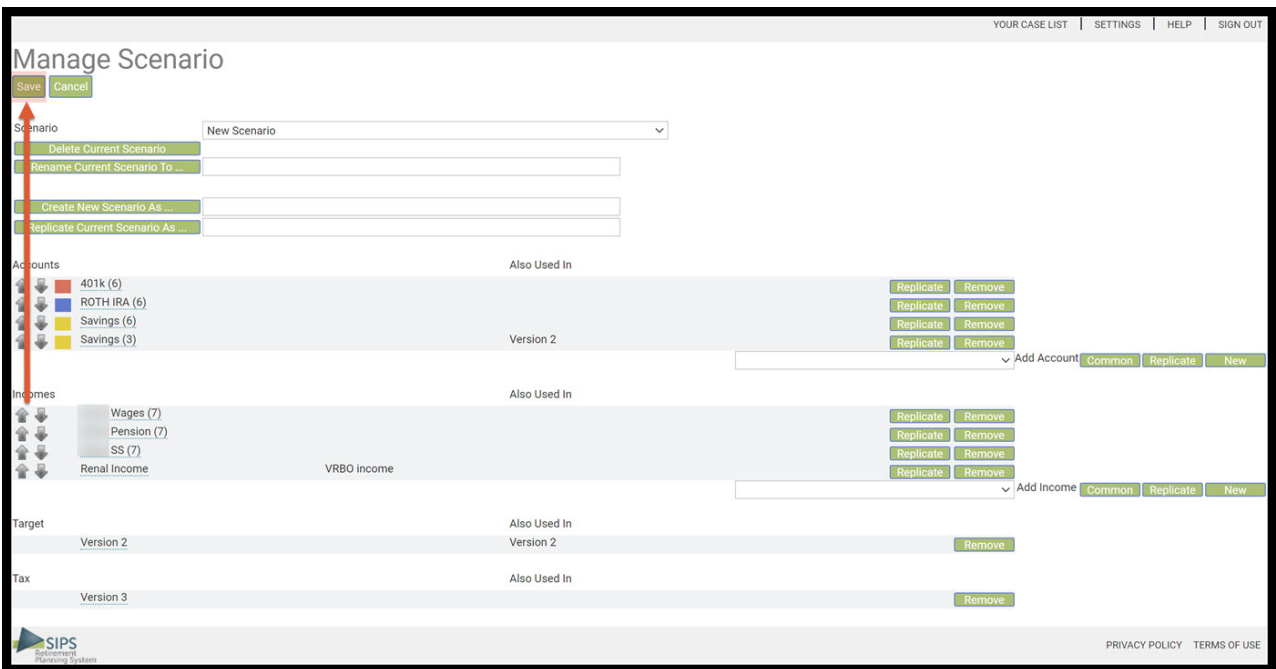
PRIVACY POLICY TERMS OF USE

Step 16: Table: The new tax will also show which other scenario the account is being used.





Step 17: Save: Click the green Save button underneath the Manage Scenario subheading.



Step 18: Structured Income Plan: The new accounts, income, target, and taxes should have new columns in the structured income plan.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

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	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %	829,000											
initial amount		665,000	100,000		32,000		32,000		829,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 2.00 %						
bonus % w/ bonus		665,000	100,000		32,000		32,000		829,000										from total income to target	
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	0	873,540	0	175,000	0	14,400	(1,894)	187,506	0	187,506	end of 1	
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	19,584	(1,984)	196,450	0	196,450	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	0	970,451	0	182,785	0	19,976	(2,028)	200,733	0	200,733	end of 3	
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	0	1,023,131	0	186,806	0	20,375	(2,072)	205,109	0	205,109	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	0	1,078,850	0	190,916	0	20,783	(2,117)	209,581	75,000	134,581	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	0	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	75,000	194,601	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	0	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	0	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	0	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	75,000	214,412	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	0	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	75,000	221,344	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	0	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	75,000	228,447	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	0	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	0	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	75,000	243,184	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	0	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	75,000	250,827	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	0	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	75,000	258,660	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	0	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	75,000	266,686	end of 16
															(43,909)	4,346,958	900,000	3,446,958		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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Step 19: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

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	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %	829,000											
initial amount		665,000	100,000		32,000		32,000		829,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 2.00 %						
bonus % w/ bonus		665,000	100,000		32,000		32,000		829,000										from total income to target	
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	0	873,540	0	175,000	0	14,400	(1,894)	187,506	0	187,506	end of 1	
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	19,584	(1,984)	196,450	0	196,450	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	0	970,451	0	182,785	0	19,976	(2,028)	200,733	0	200,733	end of 3	
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	0	1,023,131	0	186,806	0	20,375	(2,072)	205,109	0	205,109	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	0	1,078,850	0	190,916	0	20,783	(2,117)	209,581	75,000	134,581	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	0	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	75,000	194,601	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	0	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	0	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	0	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	75,000	214,412	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	0	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	75,000	221,344	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	0	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	75,000	228,447	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	0	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	0	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	75,000	243,184	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	0	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	75,000	250,827	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	0	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	75,000	258,660	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	0	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	75,000	266,686	end of 16
															(43,909)	4,346,958	900,000	3,446,958		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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Step 20: 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

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

## Structured Income Planning

Dynamic Mode

Scenario: New Scenario

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	59	6.00 %	IRA	4.00 %					829,000											
initial amount		665,000	100,000	32,000					829,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %	Infl Factor 2.00 %						
bonus % w/bonus		0.00 %	0.00 %	0.00 %					0											
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	873,540	0	175,000	0	0	14,400	(1,894)	187,506	0	187,506	end of 1	
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	920,640	0	178,850	0	0	19,584	(1,984)	196,450	0	196,450	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	970,451	0	182,785	0	0	19,976	(2,028)	200,733	0	200,733	end of 3	
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	75,000	134,581	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	75,000	194,601	end of 6	
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7	
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	end of 8	
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	75,000	214,412	end of 9	
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	75,000	221,344	end of 10	
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	75,000	228,447	end of 11	
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	end of 12	
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	75,000	243,184	end of 13	
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	75,000	250,827	end of 14	
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	75,000	258,660	end of 15	
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	75,000	266,686	end of 16	
									0		3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 21: 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

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

## Structured Income Planning

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	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	59	6.00 %	IRA	4.00 %					829,000											
initial amount		665,000	100,000	32,000					829,000	Subtotal of account incomes	Manage 2.20 %	Manage 3.20 %	Manage 3.20 %	Manage 2.00 %						
bonus % w/bonus		0.00 %	0.00 %	0.00 %					0											
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	873,540	0	175,000	0	0	14,400	(1,894)	187,506	0	187,506	end of 1	
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	920,640	0	178,850	0	0	19,584	(1,984)	196,450	0	196,450	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	970,451	0	182,785	0	0	19,976	(2,028)	200,733	0	200,733	end of 3	
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	75,000	134,581	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	75,000	194,601	end of 6	
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7	
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	end of 8	
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	75,000	214,412	end of 9	
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	75,000	221,344	end of 10	
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	75,000	228,447	end of 11	
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	end of 12	
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	75,000	243,184	end of 13	
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	75,000	250,827	end of 14	
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	75,000	258,660	end of 15	
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	75,000	266,686	end of 16	
									0		3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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Step 22: 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:

Planning Horizon: 16 years

Year	401k (6)		ROTH IRA (6)		Savings (6)		Savings (3)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income	Account	Income											
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %	829,000										
initial amount		665,000		100,000		32,000		32,000	0										
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	0										
w/bonus		665,000		100,000		32,000		32,000	829,000										
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	873,540	0	175,000	0	0	14,400	(1,894)	187,506	0	187,506	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	920,640	0	178,850	0	0	19,584	(1,984)	196,450	0	196,450	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	970,451	0	182,785	0	0	19,976	(2,028)	200,733	0	200,733	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	75,000	134,581	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	1,137,784	0	195,116	30,000	26,010	21,198	(2,725)	269,601	75,000	194,601	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	75,000	214,412	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	1,409,633	0	212,861	34,028	29,503	22,946	(2,992)	296,344	75,000	221,344	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	75,000	228,447	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	75,000	243,184	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	75,000	250,827	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	75,000	258,660	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	75,000	266,686	end of 16
											3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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