

Replicating a Current Individual Account and Income Item

01/12/2026 11:11 am EST

Under the manage scenario page you can replicate current accounts and incomes that are being used in the current scenarios you are viewing. Below are the step-by-step guidelines for this option.

Step 1: Pick the Account: Under the accounts section, select which account you would like to replicate.

The screenshot shows the 'Manage Scenario' page with a top navigation bar containing 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the title 'Manage Scenario' are 'Save' and 'Cancel' buttons. A 'Scenario' dropdown menu is set to 'New Scenario (1)'. Below this are buttons for 'Delete Current Scenario', 'Rename Current Scenario To ...', 'Create New Scenario As ...', and 'Replicate Current Scenario As ...'. The main section is divided into 'Accounts', 'Incomes', 'Target', and 'Tax'. The 'Accounts' section is highlighted with a light orange background and lists '401k (7)', 'ROTH IRA (7)', and 'Savings (9)'. Each account has a 'Replicate' and 'Remove' button. A red arrow points to the 'Replicate' button for the '401k (7)' account. To the right of the account list are 'Add Account', 'Common', 'Replicate', and 'New' buttons. The 'Incomes' section lists 'Wages (3)', 'SS (3)', and 'Pension (3)', each with 'Replicate' and 'Remove' buttons, and 'Add Income', 'Common', 'Replicate', and 'New' buttons. The 'Target' and 'Tax' sections have 'Add Target' and 'Add Tax' buttons, respectively, along with 'Common', 'Replicate', and 'New' buttons. The SIPS Retirement Planning System logo is in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' links are in the bottom right.

Step 2: Replicate: Click on the green replicate button.

This screenshot is identical to the one above, showing the 'Manage Scenario' page. A red arrow points to the 'Replicate' button for the '401k (7)' account, which is the same as in the previous image. The interface elements, including the navigation bar, scenario dropdown, account list, and various buttons, are the same as described in the previous block.

Step 3: Accounts List: The replicated account should show up within the list.

The screenshot shows 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 is set to 'New Scenario (1)'. Below this are buttons for 'Delete Current Scenario', 'Rename Current Scenario To ...', 'Create New Scenario As ...', and 'Replicate Current Scenario As ...'. The main section is divided into 'Accounts', 'Incomes', 'Target', and 'Tax'. The 'Accounts' section is highlighted, showing a list of accounts: '401k (7)', 'ROTH IRA (7)', 'Savings (9)', and 'ROTH IRA (8)'. The 'ROTH IRA (8)' account is selected, and a red arrow points to its 'Replicate' button. To the right of the account list, there are 'Add Account', 'Common', 'Replicate', and 'New' buttons. The 'Incomes' section shows 'Wages (3)', 'SS (3)', and 'Pension (3)'. The 'Target' and 'Tax' sections are also visible, each with 'Add Target' and 'Add Tax' buttons respectively. The bottom of the page features the 'SIPS Retirement Planning System' logo and links for 'PRIVACY POLICY' and 'TERMS OF USE'.

Step 4: Pick the Income: Under the income section, select which account you would like to replicate.

This screenshot is identical to the one above, showing the 'Manage Scenario' interface. In this step, the 'Incomes' section is highlighted. The list of incomes includes 'Wages (3)', 'SS (3)', and 'Pension (3)'. The 'Pension (3)' income is selected, and a red arrow points to its 'Replicate' button. The 'Add Income', 'Common', 'Replicate', and 'New' buttons are visible to the right of the income list. The rest of the interface, including the 'Accounts' section and the bottom navigation, remains the same.

Step 5: Replicate: Click on the green replicate 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 (7)		Replicate	Remove
ROTH IRA (7)		Replicate	Remove
Savings (9)		Replicate	Remove
ROTH IRA (8)		Replicate	Remove

[Add Account](#) [Common](#) [Replicate](#) [New](#)

Incomes	Also Used In		
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove

[Add Income](#) [Common](#) [Replicate](#) [New](#)

Target: [Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax: [Add Tax](#) [Common](#) [Replicate](#) [New](#)

SIPS Retirement Planning System [PRIVACY POLICY](#) [TERMS OF USE](#)

Step 6: Incomes List: The replicated income should show up within the list.

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 (7)		Replicate	Remove
ROTH IRA (7)		Replicate	Remove
Savings (9)		Replicate	Remove
ROTH IRA (8)		Replicate	Remove

[Add Account](#) [Common](#) [Replicate](#) [New](#)

Incomes	Also Used In		
Wages (3)		Replicate	Remove
SS (3)		Replicate	Remove
Pension (3)		Replicate	Remove
Pension (8)		Replicate	Remove

[Add Income](#) [Common](#) [Replicate](#) [New](#)

Target: [Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax: [Add Tax](#) [Common](#) [Replicate](#) [New](#)

SIPS Retirement Planning System [PRIVACY POLICY](#) [TERMS OF USE](#)

Step 7: Save: Click the green Save button underneath the Manage Scenario 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 Inv 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 (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000	0						
initial amount		665,000		100,000		32,000		100,000	897,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
w/bonus		665,000		100,000		32,000		100,000	897,000							
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
			0		0		0		0		914,356	336,576	388,208	388,208	2,027,349	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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.

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	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000	0						
initial amount		665,000		100,000		32,000		100,000	897,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
w/bonus		665,000		100,000		32,000		100,000	897,000							
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
			0		0		0		0		914,356	336,576	388,208	388,208	2,027,349	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 11: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: _____
INITIAL PLAN DATE: _____
REVISED PLAN DATE: _____

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

Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	4.00 %			897,000	0						
initial amount		665,000	100,000	32,000	100,000	100,000	100,000	100,000	897,000	0						
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0	Subtotal of account incomes	Manage Infi Factor 2.20 %	Manage Infi Factor 3.20 %	Manage Infi Factor 3.20 %	Manage Infi Factor 3.20 %		
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
			0		0		0		0		914,356	336,576	388,208	388,208	2,027,349	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS 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.

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:

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	4.00 %			897,000	0						
initial amount		665,000	100,000	32,000	100,000	100,000	100,000	100,000	897,000	0						
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0	Subtotal of account incomes	Manage Infi Factor 2.20 %	Manage Infi Factor 3.20 %	Manage Infi Factor 3.20 %	Manage Infi Factor 3.20 %		
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
			0		0		0		0		914,356	336,576	388,208	388,208	2,027,349	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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