

Replicating an Existing Account and Income Item

09/17/2024 1:43 pm EDT

Within the structured income plan, you can replicate/copy an individual account and income from the manage scenario page. Below is a step-by-step guide for replicating/copy and individual account and/or income.

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

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, a 'PREPARED BY:' field is visible. The main navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The 'Structured Income Planning' sub-heading is highlighted, and a green 'Edit' button is located directly below it. To the right of the 'Edit' button is a 'Dynamic Mode' button. Below the buttons is a 'Scenario' dropdown menu set to 'New Scenario'. The 'Planning Horizon' is set to '16 years'. The table below shows data for three account types: 401k (6), ROTH IRA (6), and Savings (6). The table columns include Year, Account, Income, Accounts Total, Planned Distribution, Wages (7), Pension (7), SS (7), Total Income, and Year. The table data is as follows:

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %		1.00 %	797,000	0					
initial amount		665,000		100,000		32,000	797,000	0					
bonus %		0.00 %		0.00 %		0.00 %							
w/bonus		665,000		100,000		32,000							
end of 1	60	704,900	0	104,000	0	32,320	841,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	887,997	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	937,481	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	989,832	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	1,045,217	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	1,103,815	0	195,116	30,000	26,010	251,126	end of 6
end of 7	66	999,914	0	131,593	0	34,308	1,165,815	0	199,408	30,960	26,842	257,211	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	1,231,417	0	203,795	31,951	27,701	263,447	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	1,300,832	0	208,279	32,973	28,588	269,840	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	1,374,285	0	212,861	34,028	29,503	276,392	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	1,452,014	0	217,544	35,117	30,447	283,108	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	1,534,271	0	222,330	36,241	31,421	289,992	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	1,621,322	0	227,221	37,401	32,426	297,048	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	1,713,451	0	232,220	38,597	33,464	304,281	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	1,810,955	0	237,329	39,833	34,535	311,696	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	1,914,153	0	242,550	41,107	35,640	319,297	end of 16
		0	0	0	0	0	0	0	3,313,008	388,208	336,576	4,037,792	

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:

Planning Horizon:

Year	401k (6)		ROTH IRA (6)		Savings (6)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year
	Account	Income	Account	Income	Account	Income							
net return	59	6.00 %	IRA	4.00 %		1.00 %							
initial amount		665,000		100,000		32,000	797,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
bonus % w/bonus		0.00 %		0.00 %		0.00 %	0						
		665,000	Manage	100,000	Manage	32,000	797,000						
end of 1	60	704,900	0	104,000	0	32,200	841,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,443	887,997	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,670	937,481	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	32,899	989,832	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,132	1,045,217	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,359	1,103,815	0	195,116	30,000	26,010	251,126	end of 6
end of 7	66	999,914	0	131,593	0	34,308	1,165,815	0	199,408	30,960	26,842	257,211	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	1,231,417	0	203,795	31,951	27,701	263,447	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	1,300,832	0	208,279	32,973	28,588	269,840	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	1,374,285	0	212,861	34,028	29,503	276,392	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	1,452,014	0	217,544	35,117	30,447	283,108	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	1,534,271	0	222,330	36,241	31,421	289,992	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	1,621,322	0	227,221	37,401	32,426	297,048	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	1,713,451	0	232,220	38,597	33,464	304,281	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	1,810,955	0	237,329	39,833	34,535	311,696	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	1,914,153	0	242,550	41,107	35,640	319,297	end of 16
			0		0			0	3,313,008	388,208	336,576	4,037,792	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 3: Replicate Account: Click on the green Replicate button for the individual account 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 (6) [Replicate](#) [Remove](#)
- ROTH IRA (6) [Replicate](#) [Remove](#)
- Savings (6) [Replicate](#) [Remove](#)

Incomes Also Used In

- Wages (7) [Replicate](#) [Remove](#)
- Pension (7) [Replicate](#) [Remove](#)
- SS (7) [Replicate](#) [Remove](#)

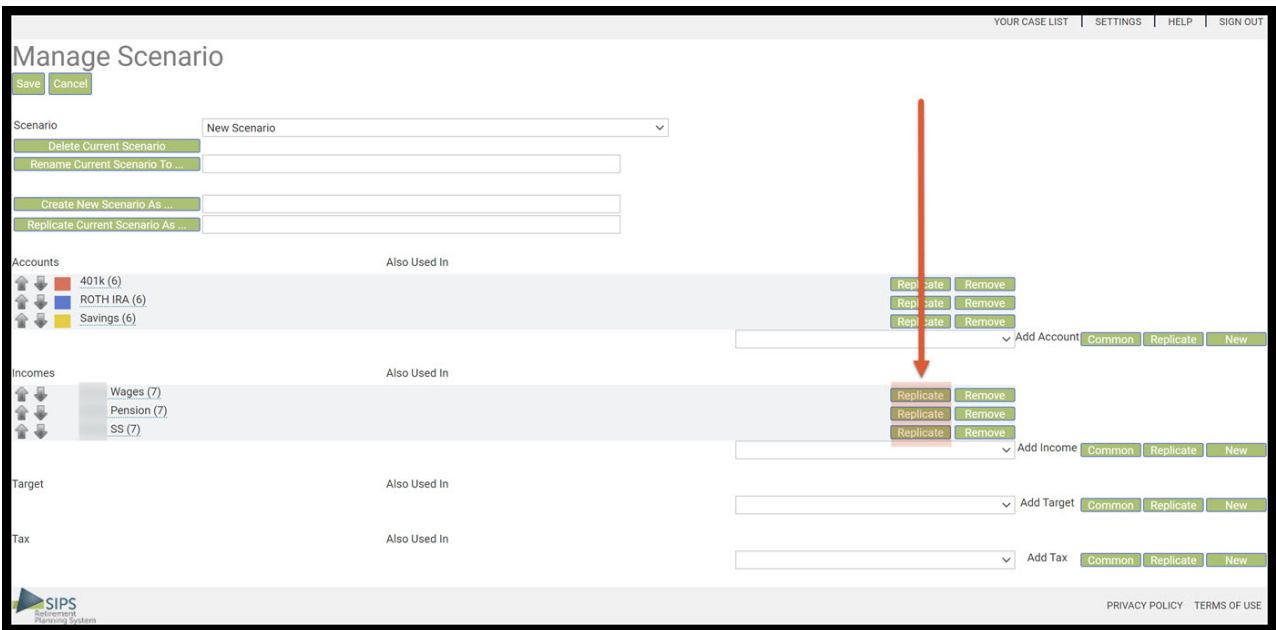
Target Also Used In [Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax Also Used In [Add Tax](#) [Common](#) [Replicate](#) [New](#)

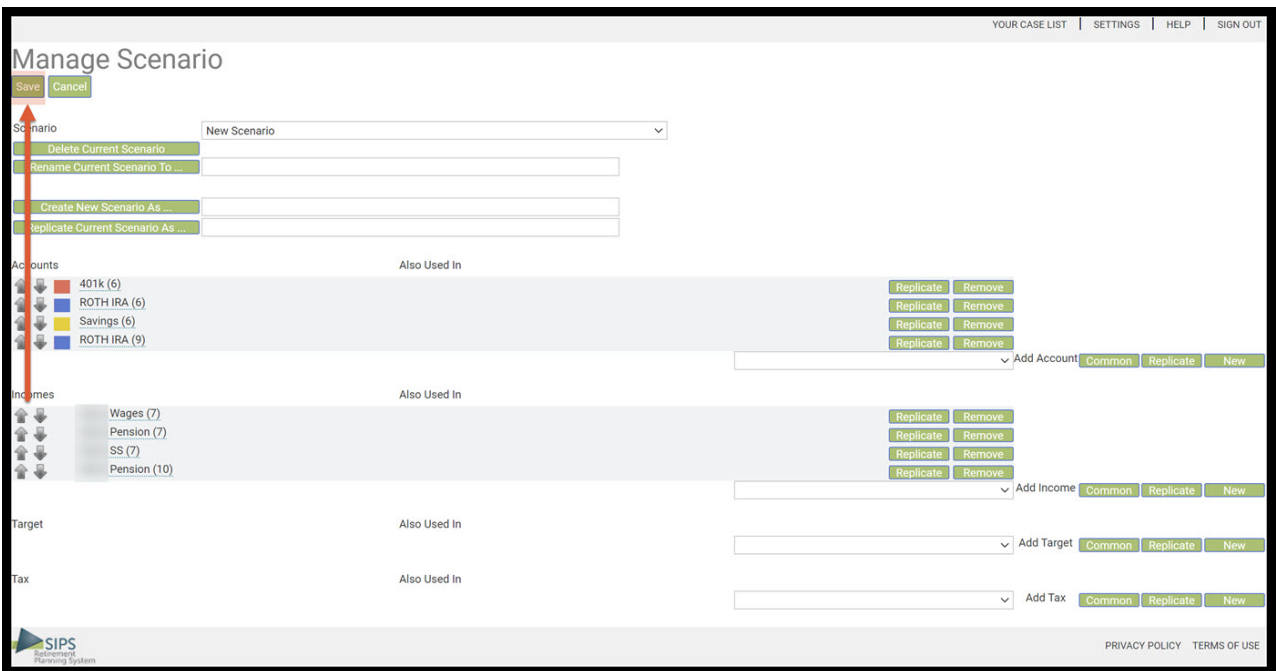
SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 4: Replicate Income: Click on the green Replicate button for the individual income you would like to replicate.



Step 5: Save: Click on the Save button underneath the Manage Scenario subheading.



Step 6: Structured Income Plan: The new replicated accounts and incomes should have new columns in the structured income plan.

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: New Scenario

Planning Horizon: 16 years

Year	Account	401k (6)		ROTH IRA (6)		Savings (6)		ROTH IRA (9)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (10)	Total Income	Year
		Income		Income		Income		Income									
net return	59	6.00%	IRA	4.00%		1.00%		4.00%		897,000	0	0	0	0	0	0	
initial amount		665,000	100,000	0	0	32,000	0	100,000	0	0	0	0	0	0	0	0	
bonus % w/bonus		0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0	
		665,000	100,000	100,000	32,000	100,000	100,000	100,000	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%	0	
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	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	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	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	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	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	195,116	30,000	26,010	30,000	281,126	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	199,408	30,960	26,842	30,960	288,171	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	203,795	31,951	27,701	31,951	295,398	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	208,279	32,973	28,588	32,973	302,813	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	212,861	34,028	29,503	34,028	310,420	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	217,544	35,117	30,447	35,117	318,225	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	222,330	36,241	31,421	36,241	326,232	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	227,221	37,401	32,426	37,401	334,449	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	232,220	38,597	33,464	38,597	342,879	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	237,329	39,833	34,535	39,833	351,529	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	242,550	41,107	35,640	41,107	360,404	end of 16
			0		0		0		0			3,313,008	388,208	336,576	388,208	4,426,001	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 7: 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: New Scenario

Planning Horizon: 16 years

Year	Account	401k (6)		ROTH IRA (6)		Savings (6)		ROTH IRA (9)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (10)	Total Income	Year
		Income		Income		Income		Income									
net return	59	6.00%	IRA	4.00%		1.00%		4.00%		897,000	0	0	0	0	0	0	
initial amount		665,000	100,000	0	0	32,000	0	100,000	0	0	0	0	0	0	0	0	
bonus % w/bonus		0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0	
		665,000	100,000	100,000	32,000	100,000	100,000	100,000	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%	0	
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	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	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	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	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	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	195,116	30,000	26,010	30,000	281,126	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	199,408	30,960	26,842	30,960	288,171	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	203,795	31,951	27,701	31,951	295,398	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	208,279	32,973	28,588	32,973	302,813	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	212,861	34,028	29,503	34,028	310,420	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	217,544	35,117	30,447	35,117	318,225	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	222,330	36,241	31,421	36,241	326,232	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	227,221	37,401	32,426	37,401	334,449	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	232,220	38,597	33,464	38,597	342,879	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	237,329	39,833	34,535	39,833	351,529	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	242,550	41,107	35,640	41,107	360,404	end of 16
			0		0		0		0			3,313,008	388,208	336,576	388,208	4,426,001	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 8: 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: New Scenario

Planning Horizon: 16 years

Year	401k (6)		ROTH IRA (6)		Savings (6)		ROTH IRA (9)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (10)	Total Income	Year	
	Account	Income	Account	Income	Account	Income	Account	Income									
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000								
initial amount		665,000		100,000		32,000		100,000	897,000	Subtotal of account incomes							
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0.00 %	897,000	Infl Factor	2.20 %	Infl Factor	3.20 %	Infl Factor	3.20 %	Infl 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	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	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	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	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	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	195,116	30,000	26,010	30,000	281,126	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	199,408	30,960	26,842	30,960	288,171	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	203,795	31,951	27,701	31,951	295,398	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	208,279	32,973	28,588	32,973	302,813	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	212,861	34,028	29,503	34,028	310,420	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	217,544	35,117	30,447	35,117	318,225	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	222,330	36,241	31,421	36,241	326,232	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	227,221	37,401	32,426	37,401	334,449	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	232,220	38,597	33,464	38,597	342,879	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	237,329	39,833	34,535	39,833	351,529	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	242,550	41,107	35,640	41,107	360,404	end of 16
			0		0		0		0		0	3,313,008	388,208	336,576	388,208	4,426,001	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 9: 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: New Scenario

Planning Horizon: 1 years

Year	401k (6)		ROTH IRA (6)		Savings (6)		ROTH IRA (9)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (10)	Total Income	Year	
	Account	Income	Account	Income	Account	Income	Account	Income									
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000								
initial amount		665,000		100,000		32,000		100,000	897,000	Subtotal of account incomes	Manage	Manage	Manage	Manage			
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0.00 %	897,000	Infl Factor	2.20 %	Infl Factor	3.20 %	Infl Factor	3.20 %	Infl 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	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	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	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	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	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	195,116	30,000	26,010	30,000	281,126	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	199,408	30,960	26,842	30,960	288,171	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	203,795	31,951	27,701	31,951	295,398	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	208,279	32,973	28,588	32,973	302,813	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	212,861	34,028	29,503	34,028	310,420	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	217,544	35,117	30,447	35,117	318,225	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	222,330	36,241	31,421	36,241	326,232	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	227,221	37,401	32,426	37,401	334,449	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	232,220	38,597	33,464	38,597	342,879	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	237,329	39,833	34,535	39,833	351,529	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	242,550	41,107	35,640	41,107	360,404	end of 16
			0		0		0		0		0	3,313,008	388,208	336,576	388,208	4,426,001	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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Step 10: 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:

Year	401k (6)		ROTH IRA (6)		Savings (6)		ROTH IRA (9)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (10)	Total Income	Year	
	Account	Income	Account	Income	Account	Income	Account	Income									
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000								
initial amount		665,000		100,000		32,000		100,000	897,000	Subtotal of account incomes							
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0.00 %	897,000	Infl Factor	2.20 %	Infl Factor	3.20 %	Infl Factor	3.20 %	Infl Factor	3.20 %
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	945,220	0	175,000	0	0	0	175,000	end of 1	
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	996,157	0	178,850	0	0	0	178,850	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	1,049,968	0	182,785	0	0	0	182,785	end of 3	
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	1,106,818	0	186,806	0	0	0	186,806	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	1,166,882	0	190,916	0	0	0	190,916	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	1,230,347	0	195,116	30,000	26,010	30,000	281,126	end of 6	
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	1,297,408	0	199,408	30,960	26,842	30,960	288,171	end of 7	
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	1,368,274	0	203,795	31,951	27,701	31,951	295,398	end of 8	
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	1,443,163	0	208,279	32,973	28,588	32,973	302,813	end of 9	
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	1,522,310	0	212,861	34,028	29,503	34,028	310,420	end of 10	
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	1,605,960	0	217,544	35,117	30,447	35,117	318,225	end of 11	
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	1,694,374	0	222,330	36,241	31,421	36,241	326,232	end of 12	
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	1,787,830	0	227,221	37,401	32,426	37,401	334,449	end of 13	
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	1,886,618	0	232,220	38,597	33,464	38,597	342,879	end of 14	
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	1,991,049	0	237,329	39,833	34,535	39,833	351,529	end of 15	
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	2,101,451	0	242,550	41,107	35,640	41,107	360,404	end of 16	
			0		0		0			0	3,313,008	388,208	336,576	388,208	4,426,001		

Orange backgrounds indicate hypothetical returns

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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.