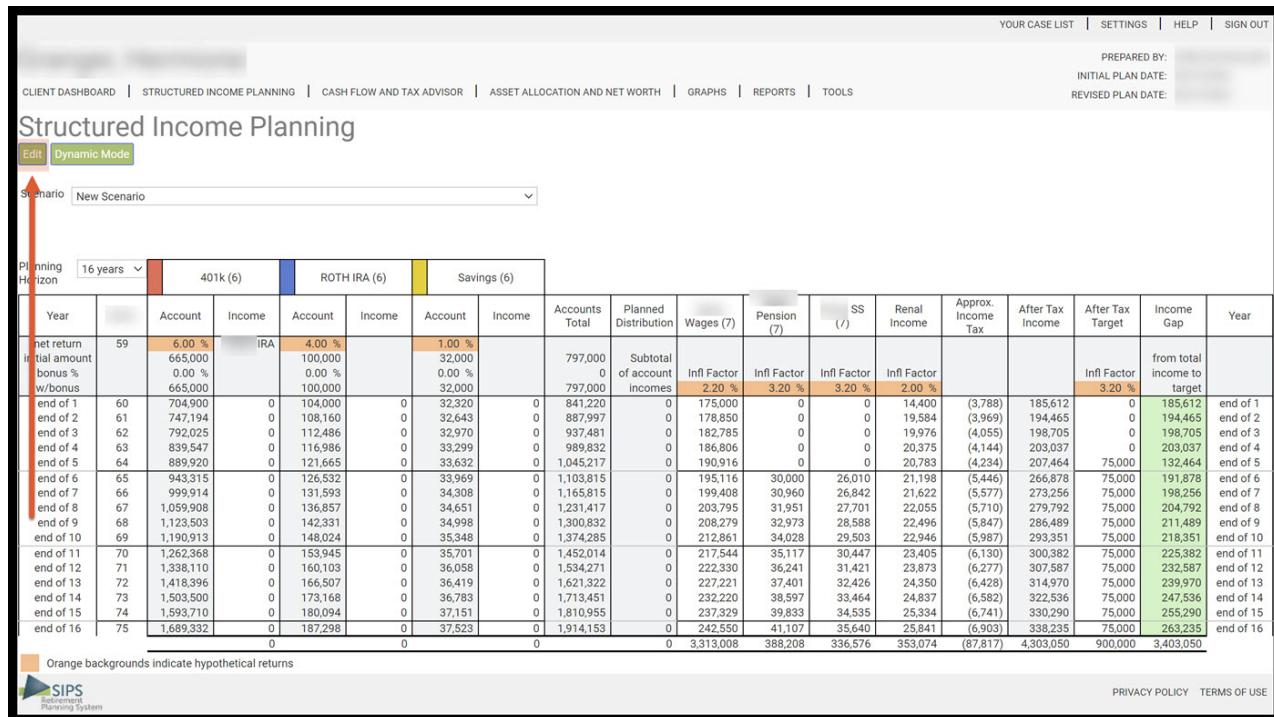


Removing an Individual Item on the Manage Scenario Page

01/12/2026 11:14 am EST

Within the structured income plan, you can remove an individual account, income, target, and tax from the manage scenario page. Below is a step-by-step guide for removing an individual item.

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



The screenshot shows the 'Structured Income Planning' section of the software. At the top, there are tabs for 'Edit' (highlighted with a red arrow) and 'Dynamic Mode'. Below this, a 'Scenario' dropdown is set to 'New Scenario'. The main area is a table titled 'Planning Horizon' with a '16 years' dropdown. The table has three columns: '401k (6)', 'ROTH IRA (6)', and 'Savings (6)'. The table rows represent years from 59 to 75, showing various financial metrics like account balances, income, and tax information. The 'Edit' button is located in the top left corner of the table area.

Step 2: Edit or Add Scenario: Click on the green Edit or Add Scenario button underneath the Structured Income Planning sub-heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: New Scenario

Planning Horizon: 16 years

401k (6)			ROTH IRA (6)			Savings (6)												
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution										
net return	59	6.00 %	IRA	4.00 %		1.00 %												
initial amount		665,000		100,000		32,000	797,000											
bonus % w/bonus		0.00 %		0.00 %		0.00 %		Subtotal of account incomes										
		665,000		100,000		32,000	797,000	2.20 %										
								Manage										
								Infl Factor										
								3.20 %										
end of 1	60	704,900	0	104,000	0	32,320	841,220	0	175,000	0	0	14,400	(3,788)	185,612	0	185,612	end of 1	
end of 2	61	747,194	0	108,160	0	32,643	887,997	0	178,850	0	0	19,584	(3,969)	194,465	0	194,465	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	937,481	0	182,785	0	0	19,976	(4,055)	198,705	0	198,705	end of 3	
end of 4	63	839,547	0	116,986	0	33,299	989,832	0	186,806	0	0	20,375	(4,144)	203,037	0	203,037	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	1,045,217	0	190,916	0	0	20,783	(4,234)	207,464	75,000	132,464	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	21,198	(5,446)	266,878	75,000	191,878	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	21,622	(5,577)	273,256	75,000	192,256	end of 7	
end of 8	67	1,059,908	0	136,857	0	34,651	1,221,417	0	203,795	31,951	27,701	22,055	(5,710)	279,792	75,000	204,792	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	22,496	(5,847)	286,489	75,000	211,489	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	22,946	(5,987)	293,351	75,000	218,351	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	23,405	(6,130)	300,382	75,000	225,382	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	23,873	(6,277)	307,587	75,000	232,587	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	24,350	(6,428)	314,970	75,000	239,970	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	24,837	(6,582)	322,538	75,000	247,536	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	25,334	(6,741)	330,290	75,000	255,290	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	25,841	(6,903)	338,235	75,000	263,235	end of 16	
										0	0	0		3,313,008	388,208	336,576	353,074	(87,817)
															4,303,050	900,000	3,403,050	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 3: Remove Account: Click on the green Remove button for the individual account you would like to remove.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario: New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

401k (6)

ROTH IRA (6)

Savings (6)

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Incomes

Wages (7)

Pension (7)

SS (7)

Income

VRBO income

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Target

Version 2 (1)

Also Used In

Remove

Tax

Version 2 tax (1)

Also Used In

Remove

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

Also Used In

401k (6)

ROTH IRA (6)

Replicate | Remove

Replicate | Remove

Incomes

Also Used In

Wages (7)

Pension (7)

SS (7)

Rental Income

VRBO income

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Also Used In

Version 2 (1)

Remove

Tax

Also Used In

Version 2 tax (1)

Remove

 SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE



Step 5: Remove Target: Click on the green Remove button for the target you would like to remove.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

Also Used In

401k (6)

ROTH IRA (6)

Replicate Remove

Replicate Remove

Add Account Common Replicate New

Incomes

Also Used In

Wages (7)

Pension (7)

SS (7)

Replicate Remove

Replicate Remove

Replicate Remove

Add Income Common Replicate New

Target

Also Used In

Version 2 (1)

Remove

Tax

Also Used In

Version 2 tax (1)

Remove



Step 6: Remove Tax: Click on the green Remove button for the tax you would like to remove.

Manage Scenario

[Save](#) [Cancel](#)

Scenario [New Scenario](#)

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts [Also Used In](#)

[401k \(6\)](#) [Replicate](#) [Remove](#)

[ROTH IRA \(6\)](#) [Replicate](#) [Remove](#)

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

Incomes [Also Used In](#)

[Wages \(7\)](#) [Replicate](#) [Remove](#)

[Pension \(7\)](#) [Replicate](#) [Remove](#)

[SS \(7\)](#) [Replicate](#) [Remove](#)

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

Target [Also Used In](#)

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

Tax [Also Used In](#)

[Remove](#)

[Version 2 tax \(1\)](#)

Step 7: Save: Click on the Save button underneath the Manage Scenario subheading.

YOUR CASE LIST
SETTINGS
HELP
SIGN OUT

Manage Scenario

Save
Cancel

Scenario
New Scenario

Delete Current Scenario
Rename Current Scenario To ...

Create New Scenario As ...
Replicate Current Scenario As ...

Accounts
Also Used In

401k (6)
ROTH IRA (6)

Replicate
Remove

Replicate
Remove

Add Account
Common
Replicate
New

Incomes
Also Used In

Wages (7)
Pension (7)
SS (7)

Replicate
Remove

Replicate
Remove

Replicate
Remove

Add Income
Common
Replicate
New

Target
Also Used In

Add Target
Common
Replicate
New

Tax
Also Used In

Add Tax
Common
Replicate
New

SIPS
Retirement Income Planning System

PRIVACY POLICY
TERMS OF USE

Step 8: Structured Income Plan: The removed items should not be present 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		401k (6)		ROTH IRA (6)							
Year		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 %		765,000	Subtotal 0						
initial amount		665,000		100,000		0	of account incomes						
bonus %		0.00 %		0.00 %									
w/bonus %		665,000		100,000		765,000							
Manage				Manage									
end of 1	60	704,900	0	104,000	0	808,900	0	175,000	0	0	175,000	end of 1	
end of 2	61	747,194	0	108,160	0	853,354	0	178,850	0	0	178,850	end of 2	
end of 3	62	792,025	0	112,486	0	904,512	0	182,785	0	0	182,785	end of 3	
end of 4	63	839,547	0	116,986	0	956,533	0	186,806	0	0	186,806	end of 4	
end of 5	64	889,920	0	121,665	0	1,011,585	0	190,916	0	0	190,916	end of 5	
end of 6	65	943,315	0	126,532	0	1,069,847	0	195,116	30,000	26,010	251,126	end of 6	
end of 7	66	999,914	0	131,593	0	1,131,507	0	199,408	30,960	26,842	257,211	end of 7	
end of 8	67	1,059,908	0	136,857	0	1,196,765	0	203,795	31,951	27,701	263,447	end of 8	
end of 9	68	1,123,503	0	142,331	0	1,265,834	0	208,279	32,973	28,588	269,840	end of 9	
end of 10	69	1,190,913	0	148,024	0	1,338,937	0	212,861	34,028	29,503	276,392	end of 10	
end of 11	70	1,262,368	0	153,945	0	1,416,313	0	217,544	35,117	30,447	283,108	end of 11	
end of 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330	36,241	31,421	289,992	end of 12	
end of 13	72	1,418,396	0	166,507	0	1,584,904	0	227,221	37,401	32,426	297,048	end of 13	
end of 14	73	1,503,500	0	173,168	0	1,676,668	0	232,220	38,597	33,464	304,281	end of 14	
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	237,329	39,833	34,535	311,196	end of 15	
end of 16	75	1,689,332	0	187,298	0	1,876,630	0	242,550	41,107	35,640	319,297	end of 16	
						0		0	0	0	0		
						3,313,008		388,208	336,576	4,037,792			

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 9: 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		401k (6)		ROTH IRA (6)							
Year		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 %		765,000	Subtotal 0						
initial amount		665,000		100,000		0	of account incomes						
bonus %		0.00 %		0.00 %									
w/bonus %		665,000		100,000		765,000							
Manage				Manage									
end of 1	60	704,900	0	104,000	0	808,900	0	175,000	0	0	175,000	end of 1	
end of 2	61	747,194	0	108,160	0	853,354	0	178,850	0	0	178,850	end of 2	
end of 3	62	792,025	0	112,486	0	904,512	0	182,785	0	0	182,785	end of 3	
end of 4	63	839,547	0	116,986	0	956,533	0	186,806	0	0	186,806	end of 4	
end of 5	64	889,920	0	121,665	0	1,011,585	0	190,916	0	0	190,916	end of 5	
end of 6	65	943,315	0	126,532	0	1,069,847	0	195,116	30,000	26,010	251,126	end of 6	
end of 7	66	999,914	0	131,593	0	1,131,507	0	199,408	30,960	26,842	257,211	end of 7	
end of 8	67	1,059,908	0	136,857	0	1,196,765	0	203,795	31,951	27,701	263,447	end of 8	
end of 9	68	1,123,503	0	142,331	0	1,265,834	0	208,279	32,973	28,588	269,840	end of 9	
end of 10	69	1,190,913	0	148,024	0	1,338,937	0	212,861	34,028	29,503	276,392	end of 10	
end of 11	70	1,262,368	0	153,945	0	1,416,313	0	217,544	35,117	30,447	283,108	end of 11	
end of 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330	36,241	31,421	289,992	end of 12	
end of 13	72	1,418,396	0	166,507	0	1,584,904	0	227,221	37,401	32,426	297,048	end of 13	
end of 14	73	1,503,500	0	173,168	0	1,676,668	0	232,220	38,597	33,464	304,281	end of 14	
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	237,329	39,833	34,535	311,196	end of 15	
end of 16	75	1,689,332	0	187,298	0	1,876,630	0	242,550	41,107	35,640	319,297	end of 16	
						0		0	0	0	0		
						3,313,008		388,208	336,576	4,037,792			

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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:
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: New Scenario

Planning Horizon: 16 years | 401k (6) | ROTH IRA (6)

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year
net return initial amount bonus % w/bonus	59 6.00 % 665,000 0.00 % 665,000	IRA 100,000 0.00 % 100,000			765,000 0 765,000	Subtotal of account incomes	2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %		
end of 1	60	704,900	0	104,000	0	808,900	0	175,000 0	0	0	175,000
end of 2	61	747,194	0	108,160	0	853,354	0	178,850 0	0	0	178,850
end of 3	62	792,025	0	112,486	0	904,512	0	182,785 0	0	0	182,785
end of 4	63	839,547	0	116,986	0	956,533	0	186,806 0	0	0	186,806
end of 5	64	889,920	0	121,665	0	1,011,585	0	190,916 0	0	0	190,916
end of 6	65	943,315	0	126,532	0	1,069,847	0	195,116 30,000	26,010	0	251,126
end of 7	66	999,914	0	131,593	0	1,131,507	0	199,408 30,960	26,842	0	257,211
end of 8	67	1,059,908	0	136,857	0	1,196,765	0	203,795 31,951	27,701	0	263,447
end of 9	68	1,123,503	0	142,331	0	1,265,834	0	208,279 32,973	28,588	0	269,840
end of 10	69	1,190,913	0	148,024	0	1,338,937	0	212,861 34,028	29,503	0	276,392
end of 11	70	1,262,368	0	153,945	0	1,416,313	0	217,544 35,117	30,447	0	283,108
end of 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330 36,241	31,421	0	289,992
end of 13	72	1,418,396	0	166,507	0	1,584,904	0	227,221 37,401	32,426	0	297,048
end of 14	73	1,503,500	0	173,168	0	1,676,668	0	232,220 38,597	33,464	0	304,281
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	237,329 39,833	34,535	0	311,696
end of 16	75	1,689,332	0	187,298	0	1,876,630	0	242,550 41,107	35,640	0	319,297
					0	3,313,008	0	388,208 336,576	4,037,792		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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: New Scenario

Planning Horizon: 1 years | 401k (6) | ROTH IRA (6)

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year
net return initial amount bonus % w/bonus	59 6.00 % 665,000 0.00 % 665,000	IRA 100,000 0.00 % 100,000			765,000 0 765,000	Subtotal of account incomes	2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
end of 1	60	704,900	0	104,000	0	808,900	0	175,000 0	0	0	175,000
end of 2	61	747,194	0	108,160	0	853,354	0	178,850 0	0	0	178,850
end of 3	62	792,025	0	112,486	0	904,512	0	182,785 0	0	0	182,785
end of 4	63	839,547	0	116,986	0	956,533	0	186,806 0	0	0	186,806
end of 5	64	889,920	0	121,665	0	1,011,585	0	190,916 0	0	0	190,916
end of 6	65	943,315	0	126,532	0	1,069,847	0	195,116 30,000	26,010	0	251,126
end of 7	66	999,914	0	131,593	0	1,131,507	0	199,408 30,960	26,842	0	257,211
end of 8	67	1,059,908	0	136,857	0	1,196,765	0	203,795 31,951	27,701	0	263,447
end of 9	68	1,123,503	0	142,331	0	1,265,834	0	208,279 32,973	28,588	0	269,840
end of 10	69	1,190,913	0	148,024	0	1,338,937	0	212,861 34,028	29,503	0	276,392
end of 11	70	1,262,368	0	153,945	0	1,416,313	0	217,544 35,117	30,447	0	283,108
end of 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330 36,241	31,421	0	289,992
end of 13	72	1,418,396	0	166,507	0	1,584,904	0	227,221 37,401	32,426	0	297,048
end of 14	73	1,503,500	0	173,168	0	1,676,668	0	232,220 38,597	33,464	0	304,281
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	237,329 39,833	34,535	0	311,696
end of 16	75	1,689,332	0	187,298	0	1,876,630	0	242,550 41,107	35,640	0	319,297
					0	3,313,008	0	388,208 336,576	4,037,792		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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 | Dynamic Mode

Scenario: New Scenario

Planning Horizon: 16 years

401k (6) | ROTH IRA (6)

Year	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 %							
initial amount		665,000		100,000		765,000					
bonus %		0.00 %		0.00 %		0					
w/bonus		665,000		100,000		765,000					
end of 1	60	704,900	0	104,000	0	808,900	0	175,000	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	853,354	0	178,850	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	904,512	0	182,785	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	956,533	0	186,806	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	1,011,585	0	190,916	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	1,069,847	0	195,116	30,000	26,010	end of 6
end of 7	66	999,914	0	131,593	0	1,131,507	0	199,408	30,960	26,842	end of 7
end of 8	67	1,059,908	0	136,857	0	1,196,765	0	203,795	31,951	27,701	end of 8
end of 9	68	1,123,503	0	142,331	0	1,265,834	0	208,279	32,973	28,588	end of 9
end of 10	69	1,190,913	0	148,024	0	1,338,937	0	212,861	34,028	29,503	end of 10
end of 11	70	1,262,368	0	153,945	0	1,416,313	0	217,544	35,117	30,447	end of 11
end of 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330	36,241	31,421	end of 12
end of 13	72	1,418,396	0	166,507	0	1,584,904	0	227,221	37,401	32,426	end of 13
end of 14	73	1,503,500	0	173,168	0	1,676,668	0	232,220	38,597	33,464	end of 14
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	237,329	39,833	34,535	end of 15
end of 16	75	1,689,332	0	187,298	0	1,876,630	0	242,550	41,107	35,640	end of 16
					0	3,313,008	0	388,208	336,576	4,037,792	
					0						

Orange backgrounds indicate hypothetical returns

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