## Removing an Individual Item on the Manage Scenario Page

09/17/2024 1:44 pm EDT

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.

IENT DASHBO	ARD S	TRUCTURED IN	COME PLANNI	NG CASH	FLOW AND TA	X ADVISOR	ASSET ALLO	CATION AND N	NET WORTH	GRAPHS	REPORTS	TOOLS				PREPARE INITIAL PLAN REVISED PLAN	DATE:	
truoti	irod	Incor		nning	ri i													
		Incor	ne Pic	, i i i i i i i i	J													
lit Dynamic	Mode																	
maria	-																	
enario New	Scenario						~											
	years 🗸	40	1k (6)	POTH	IRA (6)	Savi	ngs (6)											
rizon		40	IK (0)	KOTT		Javi	ngs (0)											
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (/)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Yea
net return	59	6.00 %	IRA	4.00 %		1.00 %			1000000		(-)						20.0000	
tial amount bonus %		665,000 0.00 %		100,000		32,000 0.00 %		797,000 0	Subtotal of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor			Infl Factor	from total income to	
w/bonus		665,000		100,000		32,000		797,000	incomes	2.20 %	3.20 %	3.20 %	2.00 %			3.20 %	target	
end of 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0	0	14,400	(3,788)	185,612	0	185,612	end o
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	19,584	(3,969)	194,465	0	194,465	end o
end of 3 end of 4	62 63	792,025 839,547	0	112,486 116,986	0	32,970 33,299	0	937,481 989,832	0	182,785 186,806	0	0	19,976 20,375	(4,055) (4,144)	198,705 203,037	0	198,705 203,037	end of end of
end of 5	64	889,920	0	121,665	0	33,632	0	1,045,217	0	190,916	0	0	20,783	(4,234)	207,464	75,000	132,464	end
end of 6	65	943,315	0	126,532	0	33,969	0	1,103,815	0	195,116	30,000	26,010	21,198	(5,446)	266,878	75,000	191,878	end o
end of 7	66	999,914	0	131,593	0	34,308	0	1,165,815	0	199,408	30,960	26,842	21,622	(5,577)	273,256	75,000	198,256	end
end of 8 end of 9	67 68	1,059,908 1,123,503	0	136,857 142,331	0	34,651 34,998	0	1,231,417 1,300,832	0	203,795 208,279	31,951 32,973	27,701 28,588	22,055 22,496	(5,710) (5,847)	279,792 286,489	75,000 75,000	204,792 211,489	end of end of
end of 9 end of 10	69	1,123,503	0	142,331	0	34,998	0	1,300,832	0	208,279	34,028	28,588	22,496	(5,847)	286,489	75,000	211,489	end o
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	217,544	35,117	30,447	23,405	(6,130)	300,382	75,000	225,382	end o
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	222,330	36,241	31,421	23,873	(6,277)	307,587	75,000	232,587	end c
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,621,322	0	227,221	37,401	32,426	24,350	(6,428)	314,970	75,000	239,970	end o
end of 14	73	1,503,500	0	173,168	0	36,783	0	1,713,451	0	232,220	38,597	33,464	24,837	(6,582)	322,536	75,000	247,536	end o
end of 15 end of 16	74	1,593,710 1,689,332	0	180,094 187,298	0	37,151 37,523	0	1,810,955 1,914,153	0	237,329 242.550	39,833 41,107	34,535 35.640	25,334 25.841	(6,741)	330,290 338,235	75,000 75.000	255,290 263,235	end o end o
	15	1,009,032	0	107,298	0	37,323	0	1,914,103	0	3,313,008	388,208	336,576	353,074	(87,817)	4,303,050	900,000	3,403,050	enuo
					0		0		0		,	,-/0		1	.,,-00	,	.,,	

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

																PREPARE		
CLIENT DASHBO	ARD S	TRUCTURED IN	COME PLANN	ING CASH	FLOW AND TA	X ADVISOR	ASSET ALLO	CATION AND N	NET WORTH	GRAPHS	REPORTS	TOOLS				REVISED PLAN		
Struct	urod	Incor	no Dl	nnin	~													
Silucii						_												
dit Save C	Cancel A	dd Account	Add Income	Add Inc Tax	Add Target	Edit or Add	Scenario	isplay Optior	IS									
eenerie						-												
cenario New	v Scenario					-	~											
	years ~	40	1k (6)	POTI	HIRA (6)	Con	ngs (6)											
orizon		40	TK (0)	KUIP	1 IKA (0)	Sd	ngs (o)				_							
Year	-	Account	Income	Account	Income	Account	Income	Accounts	Planned		Pension	SS	Renal	Approx. Income	After Tax	After Tax	Income	Year
								Total	Distribution	Wages (7)	(7)	(7)	Income	Tax	Income	Target	Gap	
net return nitial amount	59	6.00 % 665.000	IRA	4.00 %		1.00 %		797.000	Subtotal	Manage	Manage	Manage	Manage	Manage		Manage	from total	
bonus %		0.00 %		0.00 %		0.00 %		000,797	of account	Infl Eactor	Infl Factor	Infl Factor	Infl Factor	manage		Infl Factor	income to	
w/bonus		665,000	Manage	100,000	Manage	32,000	Manage	797,000	incomes	2.20 %	3.20 %	3.20 %	2.00 %			3.20 %	target	
end of 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0	0	14,400	(3,788)	185,612	0	185,612	end of
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	19,584	(3,969)	194,465	0	194,465	end of
end of 3	62	792,025	0	112,486	0	32,970	0	937,481	0	182,785	0	0	19,976	(4,055)	198,705	0	198,705	end of
end of 4	63	839,547	0	116,986	0	33,299	0	989,832	0	186,806	0	0	20,375	(4,144)	203,037	0	203,037	end of
end of 5 end of 6	64 65	889,920	0	121,665 126,532	0	33,632	0	1,045,217	0	190,916		-	20,783	(4,234)	207,464	75,000	132,464	end of
end of 6 end of 7	66	943,315 999,914	0	120,532	0	33,969 34,308	0	1,103,815	0	195,116 199,408	30,000 30,960	26,010 26,842	21,198 21,622	(5,446) (5,577)	266,878 273,256	75,000	191,878 198,256	end of end of
end of 8	67	1.059.908	0	136.857	0	34,651	0	1,231,417	0	203,795	31,951	27,701	22,055	(5,710)	279,792	75,000	204,792	end of
end of 9	68	1,123,503	0	142.331	0	34,998	Ő	1,300,832	Ő	208,279	32,973	28,588	22,496	(5,847)	286,489	75,000	211,489	end of
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,374,285	0	212,861	34,028	29,503	22,946	(5,987)	293,351	75,000	218,351	end of 1
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	217,544	35,117	30,447	23,405	(6,130)	300,382	75,000	225,382	end of 1
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	222,330	36,241	31,421	23,873	(6,277)	307,587	75,000	232,587	end of 1
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,621,322	0	227,221	37,401	32,426	24,350	(6,428)	314,970	75,000	239,970	end of 1
end of 14	73	1,503,500	0	173,168	0	36,783	0	1,713,451	0	232,220	38,597	33,464	24,837	(6,582)	322,536	75,000	247,536	end of 1
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,810,955	0	237,329	39,833	34,535	25,334	(6,741)	330,290	75,000	255,290	end of 1
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,914,153	0	242,550	41,107	35,640	25,841	(6,903)	338,235	75,000	263,235	end of 1
			0		0		0		0	3,313,008	388,208	336,576	353,074	(87,817)	4,303,050	900,000	3,403,050	
Orange ba																		

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		
Rename current Scenario To		
Create New Scenario As		
Replicate Current Scenario As		
Accounts	Also Used In	+
401k (6)		Replicate Remove
A CTH IRA (6) Savings (6)		Replicate Remove Replicate Remove
		Add Account Common Replicate New
Incomes	Also Used In	
1 Wages (7)		Replicate Remove
Pension (7) SS (7)		Replicate Remove
Wages (7)           Pension (7)           SS (7)           Income         VRB0 income		Replicate Remove
		Add Income Common Replicate New
Target	Also Used In	
Version 2 (1)		Remove
Tax	Also Used In	
Version 2 tax (1)		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
Mana Save Cano	age Scenar	io									
	e Current Scenario Current Scenario To	New Scenario				~					
	New Scenario As Current Scenario As										
Accounts				A	lso Used In						
	401k (6) ROTH IRA (6)						Replicate Rer Replicate Rer	ove			
								✓ Add Account	Common	Replicate	New
Incomes				A	lso Used In						
***	Wages (7) Pension (7) SS (7) Renal Income		VRBO income				Replicate Rem Replicate Rem Replicate Rem Replicate Rem	ove			
								✓ Add Income	Common	Replicate	New
Target				А	lso Used In						
	Version 2 (1)						Rem	ove			
Тах				A	lso Used In						
	Version 2 tax (1)						Rem	ove			
	stem								PRIVACY F	POLICY TER	RMS OF USE

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

						YOUR CA	SE LIST SETTING	B HELP	SIGN OUT
Mana Save Cano	ge Scenar	io							
	Current Scenario Current Scenario To	New Scenario		~					
Replicate	New Scenario As Current Scenario As								
	401k (6) ROTH IRA (6)		Also Used In		Replicate Rer Replicate Rer	ove ove	Account Common	Deplicate	New
Incomes	Wages (7)		Also Used In		Replicate Rer		Common	Replicate	New
	Pension (7) SS (7)					ove ove	Income Common	Replicate	New
Target	Version 2 (1)		Also Used In		Ren	/			
Тах	Version 2 tax (1)		Also Used In		Ren	nove			
SIPS Retirement Planning Sy	stem						PRIVAC	Y POLICY TE	RMS OF USE

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

						YOUR CASE LIS	T SETTINGS	HELP	SIGN OUT
Mana Save Canc	ge Scenar	io							
Scenario		New Scenario		~					
	Current Scenario Current Scenario To								
	New Scenario As								
Replicate (	Current Scenario As								
Accounts			Also Used In						
	401k (6) ROTH IRA (6)				Replicate Ren Replicate Ren	ove			
						→ Add Acco	unt Common	Replicate	New
Incomes			Also Used In						
술 두 술 두 술 두	Wages (7) Pension (7) SS (7)				Replicate Ren Replicate Ren Replicate Ren	ove			
					Replicate		me Common	Replicate	New
Target			Also Used In						
						✓ Add Tar	et Common	Replicate	New
Тах			Also Used In						
	Version 2 tax (1)				Ren	nove			
SIPS Retirement Planning Sys	stem						PRIVAC	Y POLICY TE	RMS OF USE

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

			YOUR CASE LIST   SETTINGS   HELP   S	SIGN OUT
Manage Scena	rio			
Scenario Delete Current Scenario Rename Current Scenario To	New Scenario	~		
Create New Scenario As Replicate Current Scenario As				
Ac counts 401k (6) ROTH IRA (6)	Also Used in		Replicate         Remove           Replicate         Remove           V Add Account         Common           Replicate         V	New
Incomes	Also Used In			
Wages (7) Pension (7) SS (7)			Replicate     Remove       Replicate     Remove       Replicate     Remove       Add Income     Common	New
Target	Also Used In		✓ Add Target Common Replicate	New
Tax	Also Used In		V Add Tax Common Replicate	New
SIPS Retirement Planning System			PRIVACY POLICY TERM	S OF USE

Step 8: Structured Income Plan: The removed items should not be present in the structured income plan.

													YOUR CASE LIST SETTINGS H	ELP SIGN OU
													PREPARED BY:	
													INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	CTURED INCO	ME PLANNING	CASH FLC	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS 1	OOLS	REVISED PLAN DATE:	
Struct	urod Ir	noom		ning										
Edit Save C	ancel Add A	Add	d Income	dd Inc Tax A	dd Target	Edit or Add So	enario Disp	olay Options						
Scenario New	Scenario						~							
New	Scenario													
lanning	16 years v				arran ana a									
lorizon	i o yeuro	40	1k (6)	ROTH	I IRA (6)									
Year	(Contractor)	Account	Income	Account	Income	Accounts	Planned		Pension	SS	Total	Year		
					moonne	Total	Distribution	Wages (7)	(7)	(7)	Income	rear		
net return nitial amount	59	6.00 % 665.000	IRA	4.00 %		765.000	Subtotal	Manage	Manage	Manage				
bonus %		0.00 %		0.00 %		00,000	of account	Infl Factor	Infl Factor	Infl Factor				
w/bonus		665,000	Manage	100,000	Manage	765,000	incomes	2.20 %	3.20 %	3.20 %				
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	855,354	0	178,850	0	0	178,850	end of 2		
end of 3 end of 4	62 63	792,025 839,547	0	112,486 116,986	0	904,512 956,533	0	182,785 186,806	0	0	182,785 186,806	end of 3 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 end of 13	71 72	1,338,110 1,418,396	0	160,103 166,507	0	1,498,213 1,584,904	0	222,330 227,221	36,241 37,401	31,421 32,426	289,992 297,048	end of 12 end of 13		
end of 13 end of 14	72	1,418,396	0	173,168	0	1,584,904	0	232,220	37,401	32,420	304,281	end of 13 end of 14		
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	232,220	39,833	34,535	311,696	end of 15		
end of 16	75	1,689,332	0	187,298	0		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 ba	ckgrounds ind	licate hypothe	etical returns											
SIPS													2011/10/2011	
Retirement Planning Syste													PRIVACY POLIC	Y TERMS OF U

Step 9: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

													YOUR CASE LIST SE	TTINGS HEL	LP S
													PI	REPARED BY:	
						2.5							INITIAL	PLAN DATE:	
CLIENT DASHB	OARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSET ALLOCA	TION AND NET	WORTH   G	RAPHS R	EPORTS	TOOLS	REVISED	PLAN DATE:	
truct	ured I	ncom	e Plar	nnina											
	Cancel Add				Add Target	Edit or Add Sc	enario Disr	alay Options							
cenaric Ne	w Scenario						~								
anning	16 years ∨	10	1k (6)	DOT	I IRA (6)										
orizon		40	IK (6)	ROTE	1 IKA (6)										
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year			
net re um	59	6.00 %	IRA	4.00 %											
hitial ar ount bonu %	Ľ.	665,000 0.00 %		100,000 0.00 %		765,000	Subtotal	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor					
w/bo us		665,000	Manage	100,000	Manage	765,000	of account incomes	2.20 %	3.20 %	3.20 %					
end c 1	60	704,900	0	104,000	0 O	808,900	0	175,000	0	0	175,000	end of 1			
end c 2	61	747,194	0	108,160	0	855,354	0	178,850	0	0	178,850	end of 2			
end c 3	62	792,025	0	112,486	0	904,512	0	182,785	0	0	182,785	end of 3			
end c 4	63	839,547	0	116,986	0	956,533	0	186,806	0	0	186,806	end of 4			
end c 5	64	889,920	0	121,665	0	1,011,585	0	190,916	0	0	190,916	end of 5			
end c 6	65 66	943,315	0	126,532	0	1,069,847	0	195,116	30,000	26,010	251,126	end of 6			
end c 7 end c 8	67	999,914 1.059,908	0	131,593 136.857	0	1,131,507 1,196,765	0	199,408 203,795	30,960 31,951	26,842 27,701	257,211 263,447	end of 7 end of 8			
end c 9	68	1,059,908	0	142.331	0	1,196,765	0	203,795	32,951	28,588	263,447	end of 8 end of 9			
end of 10	69	1,190,913	0	148.024	0	1,338,937	o o	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 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	311,696	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	3,313,008	388,208	336,576	4,037,792				
Orange b	ackgrounds in	dicate hypothe	etical returns												
SIPS														PRIVACY POLICY	TERM
Retirement Planning Syste	em														

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	
													PREPARED E	
				1.000						ana a a			INITIAL PLAN DAT	TE:
CLIENT DASHBO	ARD STRU	JCTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR /	ASSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS 1	TOOLS	REVISED PLAN DAT	TE:
Structu	urod lu	hoom	Dlar	ning										
		ICOIII	EFIAI	ming										
Edit Dynamic	Mode													
enario New	/ Scenario						~							
nning rizon	16 years ∨	401	lk (6)	ROTH	IRA (6)									
						2 2 7	100 (101				121012			
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension	(7)	Total	Year		
not roturn	59	6.00 %	IRA	4.00 %		Total	Distribution	Mayes (7)	(7)	(7)	income			
net return tial amount	59	665.000	IRA	4.00 %		765.000	Subtotal							
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor				
w/bonus		665,000		100,000		765,000	incomes	2.20 %	3.20 %	3.20 %				
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	855,354	0	178,850	0	0	178,850	end of 2		
end of 3	62 63	792,025	0	112,486	0	904,512	0	182,785	0	0	182,785	end of 3 end of 4		
end of 4 end of 5	64	839,547 889,920	0	116,986 121,665	0	956,533 1,011,585	0	186,806 190,916	0	0	186,806 190,916	end of 4 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 13	72 73	1,418,396	0	166,507	0	1,584,904	0	227,221	37,401	32,426	297,048			
end of 14 end of 15	73	1,503,500 1,593,710	0	173,168 180,094	0	1,676,668 1,773,804	0	232,220 237,329	38,597 39,833	33,464 34,535	304,281 311,696	end of 14 end of 15		
end of 15 end of 16	74	1,593,710	0	180,094	0		0	242,550	41,107	34,535	319,297	end of 15 end of 16		
cita of To	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	1,009,002	0	107,270	0	1,070,000	0		388,208	336,576	4,037,792			
Orange ba	ckgrounds ind	dicate hypothe	-					0,010,000	000,200	000,010	1,001,172			
SIPS													DRIVACY	POLICY TERMS C

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 SI
														PREPARED BY:	
CLIENT DASHBOA	RD   STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH   G	GRAPHS   R	EPORTS	TOOLS		AL PLAN DATE: ED PLAN DATE:	
Structu	rod lu	2000		ning											
Structu															
Edit Save Ca	ncel Add A	Account Add	d Income A	dd Inc Tax 🛛 A	dd Target	Edit or Add So	cenario Disp	olay Options							
Scenario New S	Cenario						~								
	Cinano														
lanning 1	years 🗸		1. (0)	DOT	104 (6)										
lorizon		40	1k (6)	ROTH	I IRA (6)										
Year	-	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	(7)	Total Income	Year			
net return initial amount	59	6.00 % 665.000	IRA	4.00 %		765,000	Subtotal								
bonus %		0.00 %		0.00 %		765,000	of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor					
w/bonus		665,000	Manage	100,000	Manage	765,000	incomes	2.20 %	3.20 %	3.20 %					
end of 1	60	704,900	0	104,000	0	808,900	0	175,000	0	0	175,000				
end of 2	61	747,194	0	108,160	0	855,354	0	178,850	0	0	178,850				
end of 3 end of 4	62 63	792,025 839,547	0	112,486	0	904,512	0	182,785 186,806	0	0	182,785				
end of 4 end of 5	64	839,547	0	116,986 121,665	0	956,533 1,011,585	0	190,916	0	0	186,806 190,916	end of 4 end of 5			
end of 6	65	943,315	0	126,532	0	1,011,383	0	195,116	30,000	26,010	251,126				
end of 7	66	999,914	0	131,593	0	1,131,507	ő	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 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 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330	36,241	31,421	289,992				
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 14 end of 15	73 74	1,503,500 1,593,710	0	173,168 180,094	0	1,676,668 1,773,804	0	232,220 237,329	38,597 39,833	33,464 34,535	304,281 311,696	end of 14 end of 15			
end of 15 end of 16	74	1,689,332	0	180,094	0	1,773,804	0	242,550	41,107	34,535	311,696	end of 15 end of 16			
	15	1,009,032	0	107,298	0	1,070,030	0		388,208	336,576	4,037,792				
Orange bac	karounds in	dicate hypothe			0		0	3,313,000	300,200	330,370	4,037,792	-			
	-g. ourius III	and the hypothe	ensur resultio												
SIPS														PRIVACY PO	LICY TERMS
Retirement Planning System															

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.

													PREPARED BY:
													INITIAL PLAN DATE:
IENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS	TOOLS	REVISED PLAN DATE:
tructu	urod lu	2000		ning									
		ncom	e Plai	ming									
dit Dynamic	Mode												
enario New	/ Scenario						~						
	16 years ∨	10	11. (4)	DOTI	104 (6)								
rizon		40	1k (6)	ROTH	IRA (6)								
10	-		12	3	1	Accounts	Planned			SS	Total		
Year		Account	Income	Account	Income	Total	Distribution	Wages (7)	Pension (7)	(/)	Income	Year	
net return	59	6.00 %	IRA	4.00 %									
itial amount		665,000		100,000		765,000	Subtotal						
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			
w/bonus end of 1	60	665,000 704,900	0	100,000	0	765,000 808,900	incomes 0	2.20 %	3.20 %	3.20 %	175,000	end of 1	
end of 2	61	747,194	0	104,000	0	855,354	0	178,850	0	ő	178,850	end of 2	
end of 3	62	792,025	0	112,486	0	904,512	0	182,785	0	Ő	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 end of 8	66 67	999,914	0	131,593	0	1,131,507	0	199,408	30,960	26,842	257,211	end of 7	
end of 8 end of 9	68	1,059,908 1,123,503	0	136,857 142,331	0	1,196,765	0	203,795 208,279	31,951 32,973	27,701 28,588	263,447 269,840	end of 8 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	311,696	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	
end of 10			0		0		0	3,313,008	388,208	336,576	4,037,792		

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.