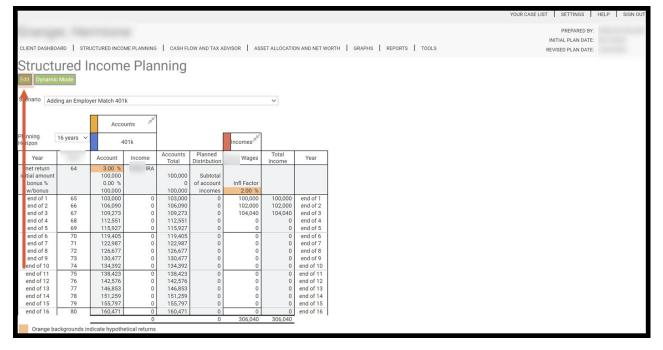
Adding an Employer Matched 401(k) Using the Tax Advance Planning Function

04/10/2025 10:50 am EDT

Within the tax advance planning function, there are multiple ways you can show an employer match 401k distribution. Below is the step-by-step guideline for showing an employer match 401k distributions using the Other Schedule 1 Income column in the tax advance planning function.

Step 1: Edit: Click on the green edit button underneath the Structured Income Planning subheading.



Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning subheading.

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0 0 306,040 306,040								306,040	0		0			
Orange backgrounds indicate hypothetical returns										0	and sectores	ante humetheti	-	Oren and have

Step 3: Other Income Name: Filter in a name.

			YOUR CASE LIST	SETTINGS HELP SIG	GN OUT
Manage Income save Cancel					
Other income name			10	Income Adjustments	
This is a Social Security income		ADD ADJUSTMENT	Year 1 2	Income adjustment	*
First year income		Pick year(s)	3		
Inflation rate	0.0 %	Pick year(s) to remove	5 6		
Number of months of income in first year	12.0		7 8		
Income description		Reset all years	9 10 11		
Delay the income start until age Age to begin income	O Client 1 age O Client 2 age		11 12 13		
Tax calculation option	Not Taxable ~		14 15		
			16 17 18		
			19		
			21 22		
			23 - 24		+
Orange backgrounds indicate hypothet	cal returns	Note that entered value	s WILL roll down t	o following years when blank	

Step 4: First Year Income: Filter in the monetary amount.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Employer Match	ADD ADJUSTMENT	Year	Income Adjustments	A
This is a Social Security income					
First year income		Pick year(s)	3		- 1
Inflation rate	0.0 %		5		- 1
Number of months of income in first year	12.0	Pick year(s) to remove	7		- 1
Income description		Reset all years	9		- 1
Delay the income start until age Age to begin income	0 Glient 1 age Client 2 age		11 12 13		
Tax calculation option	Not Taxable ~		14 15 16		
			17 18 19		
			20 21 22		
			23 74		•
Orange backgrounds indicate hypothe	tical returns	Note that entered value	es WILL roll down t	o following years when blan	k

Step 5: Inflation rate: Filter in the inflation rate.

			YOUR CASE LIST	SETTINGS HELP S	IGN OUT
Manage Income save Cancel					
Other income name	Employer Match	ADD ADJUSTMENT	Year	Income Adjustments	4
This is a Social Security income			1		
First year income	3,000	Pick year(s)			
Inflation rate	0.0 %	Pick year(s) to remove	5		
Number of months of income in first year	12.0	Pick year(s) to remove	7 8		
Income description		Reset all years	9 10		
Delay the income start until age Age to begin income	0 Client 1 age O Client 2 age		11 12 13		
Tax calculation option	Not Taxable 🗸		14 15		
			16 17 18		
			19 20		
			21 22		
			23 - 24 		•
Orange backgrounds indicate hypothet	ical returns	Note that entered value	es WILL roll down	to following years when blank	

Step 6: Tax Calculation Option: Click on the drop-down carrot arrow and select the tax calculation option.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Employer Match	ADD ADJUSTMENT		Income Adjustments	
This is a Social Security income			Year 1 2	Income adjustment	^
First year income	3,000	Pick year(s)	3 4		
Inflation rate	2 %	ck year(s) to remove	5 6		
Number of months of income in first year	12.0				
Income description		Reset all years	10		
Delay the income start until age Age to begin income	0 Client 1 age O Client 2 age		12 13		
Tax calculation option	Not Taxable ~		14 15 16		
			17 18		
			19 20		
			21 22 23		
			23		•
Orange backgrounds indicate hypothe	tical returns	Note that entered value	es WILL roll down t	to following years when blan	k

Step 7: Add Adjustment text box: Type in 0.

				YOUR CASE LIST	SETTINGS HELP SIGN OU
Manage Income Save Cancel					
Other income name	Employer Match		ADD ADJUSTMENT		Income Adjustments
This is a Social Security income	0	────		Year 1 2	Income adjustment
First year income	3,000		Pick year(s)	3 4	
Inflation rate	2 %	Pi	ck year(s) to remove	6	
Number of months of income in first year	12.0			7 8 9	
Income description			Reset all years	10	
Delay the income start until age Age to begin income	O Client 1 age O Client 2 age			12 13 14	
Tax calculation option	Not Taxable ~			14	
				17 18	
				19 20	
				21 22 23	
				24	
Orange backgrounds indicate hypothe	tical returns		Note that entered values	WILL roll down t	o following years when blank

Step 8: Income Adjustment table: Click on the year that the client will retire.

		YOUR CASE LIS	T SETTINGS HELP SIGN OUT
Manage Income Save Cancel			
Other income name	Employer Match	4	Income Adjustments
This is a Social Security income	ADD ADJUSTMEN	— 1	Income adjustment
First year income	3,000 Pick year(s)		
Inflation rate Number of months of income in first year	2 % Pick year(s) to rem	0 6	
Income description	Reset all years	8 9 10	
Delay the income start until age Age to begin income	0 Client 1 age O Client 2 age	11 12 13	
Tax calculation option	Not Taxable ~	14 15 16	
		17 18	
		19 20 21	
		22 23 24	-
		4	>
Orange backgrounds indicate hypothet	tical returns Note that enter	red values WILL roll dow	n to following years when blank

Step 9: Pick Years: Click on the green pick years button next to the income adjustment table.

		YOUR CASE LIS	T SETTINGS HELP SIGN OUT
Manage Income			
Other income name	Employer Match ADD ADJUSTMENT	-	Income Adjustments
This is a Social Security income		Year 1 2	Income adjustment
First year income	3,000 Pick year(s)	□ 3 ☑ 4	
Inflation rate	2 % Pick year(s) to remove	6	
Number of months of income in first year	12.0		
Income description	Reset all years	10	
Delay the income start until age Age to begin income	0 Client 1 age Client 2 age	12 13	
Tax calculation option	Not Taxable v	14 15 16	
		17	
		19 20	
		21 22	
		23 24	-
Orange backgrounds indicate hypothet	Note that entered va	ues WILL roll dowr	n to following years when blank

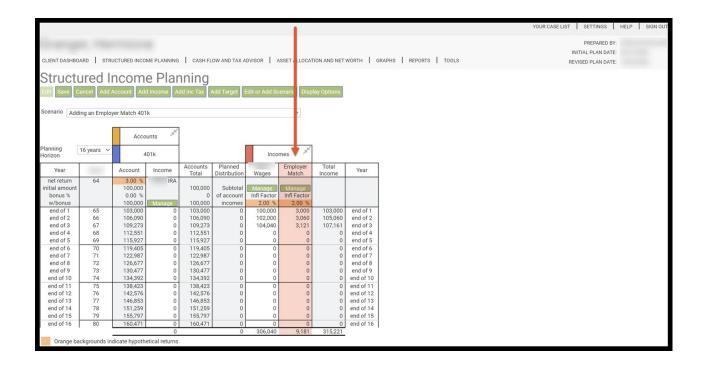
Step 10: Income Adjustment table: The zero should move to the year that the client will retire.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income save Cancel				Income Adi stments	
Other income name	Employer Match	Souther and rest with an approximate			
This is a Social Security income		ADD ADJUSTMENT	Year 1 2	Incone adjustment	^
First year income	\$3,000	Pick year(s)	3	0	
Inflation rate	2.0 %	Pick year(s) to remove	5		
Number of months of income in first year	12.0	Pick year(s) to remove	7		
Income description		Reset all years	9 10		
Delay the income start until age Age to begin income	0 O Client 1 age O Client 2 age		11 12 13		
Tax calculation option	Not Taxable ~		14 15 16		
			17		
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			21 22 23		
			24		+
Orange backgrounds indicate hypothet	cal returns	Note that entered values	WILL roll down to	o following years when blank	

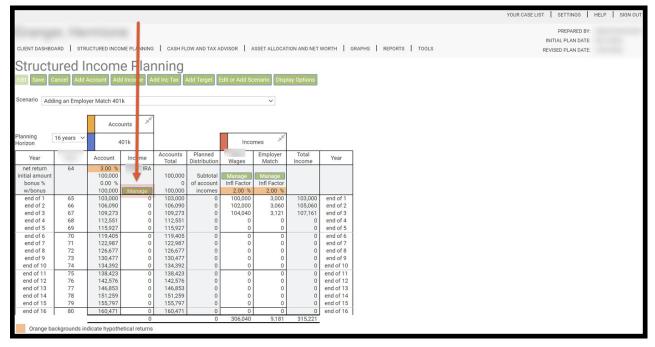
Step 11: Save: Click the green save button underneath the Manage Income subheading.

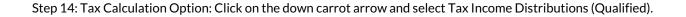
		,	OUR CASE LI	IST SETTINGS HELP	SIGN OUT
Manage Income					
1				Income Adjustments	
Otler income name	Employer Match ADD ADJUSTMEI		Maaa	lesses adjustment	-
The is a Social Security income			Year 1 2	Income adjustment	Î
Fir t year income	\$3,000 Pick year(s)		3	0	- 1
Infation rate	2.0 % Pick year(s) to rem	ove	5		- 1
Number of months of income in first year	12.0		8		- 1
Income description	Reset all years		10 11		- 1
Deay the income start until age Age to begin income	O O Client 1 age O Client 2 age		12		- 1
Ag to begin meome	0 Olient 1 age Client 2 age		13 14		
Tax calculation option	Not Taxable		15		
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		4	1 14		÷.
Orange backgrounds indicate hypothe	tical returns Note that enter	red values \	VILL roll dov	wn to following years when bla	ink

Step 12: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.



Step 13: Manage: Click on the green manage button within the column for the 401k.





Manage Account Swe Cance View / Edit Income View / Edit Actual Values Account name 401k Structured Income Type Income Data Initial account balance \$100,000 Year ADD INCOME Year Hypothetical return 3.0 % OR 3 Bonus 0.0 % Liquidate or annuitize OR 3 Optional Coptional 0 Start year for rest of plan 6 Optional account description Ulquidate or annuitize 0 7 7 Other Start year for rest of plan 6 10 10 10 Add money later - deferred account 0 Annual fixed withdrawal 0 % 10 Years deferred 0 10 10 10 10 10 10 Add money later - deferred account 0 Manual precentage withdrawal 0.0 % 10 10 10	SIGN OUT
Save Cancel View / Edit Income View / Edit Income View / Edit Income Account name 401k Structured Income Type Income Data Initial account balance \$100,000 Start page ADD INCOME 1 Income Data Hypothetical return 3.0 % Start page for east of plan 0R 4 Scount description 0.0 % Liquidate or annuitize 0R 4 Optional Account (in so many years) 0R 7 Other Tax income Distributions (Qualified) Variables 0 10 Add money later - deferred account 0 Annual precentage withdrawal 0.0 % 13	
Structured income Type Income Data Initial account balance \$100,000 Income Riders Hypothetical return 3.0 % ADD INCOME 1 Bonus 0.0 % Liquidate or annuitize 0R 4 Optional Account description 5 5 5 Account description 0R 7 6 Other OR 7 0 Tax calculation option Tax Income Distributions (Qualified) Math drawsis 0 10 Add money later - deferred account 0 Annual precentage withdrawal 0.0 % 13 <td></td>	
Hunal account detained \$100,000 1 Hypothetical return 3.0 % Pick year(s) 2 Bonus 0.0 % Uquidate or annuitize 0R 4 Optional Annuitize (for years certain) 1.0 % Start year for rest of plan 5 Account description OR 7 Optional account company OR 7 Other Start year for X years 9 Tax calculation option Tax Income Distributions (Qualified) Math drawsis 0 11 Add money later - deferred account 0 Annual precentage withdrawal 0.0 % 12	
Bonus 0.0 % Liquidate or annuitize 0.0 % 4 Optional account description Annuitize (for years certain) 1.0 % Start year for rest of plan 6 Optional account company 0 Liquidate account (in so many years) 0R 7 Other Start year for X years 9 Tax calculation option Tax Income Distributions (Qualified) Wabdrawale 0 10 Add money later - deferred account 0 Annual precentage withdrawal 0.0 % 12	Î
Bonus 0.0 % Liquidate or annuitize 4 Optional Annuitize (for years certain) 1.0 % Start year for rest of plan 5 Acount description Indicate account (in so many years) 0R 7 Optional account company Indicate account (in so many years) 0R 7 Other Start year for X years 8 Tax calculation option Tax Income Distributions (Qualified) Mab drawal 0 10 Add money later - deferred account Annual fixed withdrawal Pick year(s) to remove 12 Years deferred 0 Annual precentage withdrawal 0.0 % 13	
Tax calculation option Tax Income Distributions (Qualified) Wathdrawale 11 Add money later - deferred account Annual fixed withdrawal Pick year(s) to remove 12 Years deferred 0 Annual precentage withdrawal 0.0 % 13	
Add money later - deferred account Pick year(s) to remove 12 Years deferred 0 Annual percentage withdrawal 0.0 % 13	
Asset plan allocation Moderate See Required minimum distribution (RMD) Remove year to end of plan	
Risk level Moderate Beneficial IRA RMD (based on beneficiaries life) 16	
Account owner	
Account type 401k V () Make-up total owners RMD from one account 20	
Add an income rider 21 Make-up total benef RMD from one account 22	
Based on age Client2's age Joint Select income rider Number of months of payout in first year 12.0 Make-up income gap based on target income 23 24	•
Enter manual payout Annual Savings Annual Savings Annual fixed savings Annual fixed savings Orange backgrounds indicate hypothetical returns Note that entered values WILL NOT roll down to following years while the save set of the save set	en blank

Step 15: Structured Income Type: Click on the radio button next to Annual Fixed Savings.

					YOUR	CASE LIST SETT	INGS HELP	SIGN OUT
Manage Accourt	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	401k	Structured Income Type				Income Da	ta	
Initial account balance	\$100,000	Income Riders	ADD INCOME		Year	Income	Variable	
		O Start payout from income rider			1			
Hypothetical return	3.0 %		Pick year(s)		3			
Bonus	0.0 %		OR		4			
Optional		Liquidate or annuitize Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Account description			OR		6			
Optional account company		 Liquidate account (in so many years) 			8			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10			
Add money later - deferred account	2	Annual fixed withdrawal	Pick year(s) to remove		11 12			
Years deferred	0	O Annual percentage withdrawal 0.0 %			13			
		Required minimum distribution (RMD)	the Institute		14			
Asset plan allocation	Moderate Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15 16			
Risk level	Moderate				17			
Account owner	~		Reset all years	ŏ	18			
		Calculated Plan Withdrawals			19			
Account type Add an income rider	401k ~	 Make-up total owners RMD from one account 			20 21			
The Contract of the Contract o	Client2 's age O Joint	O Make-up total benef RMD from one account			22			
Select income rider		O Make-up income gap based on target income			23			-
Number of months of payout in first ye	ear 12.0			-	24			
Enter manual payout	12.0							
		Annual Savings						
Request Additional Rider Remove In	come Rider	Annual lixed savings						
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to fe	ollowing years w	hen blank

Step 16: Annual Fixed Savings Text Box: Type in the monetary amount.

					YOUR	CASE LIST SET	TINGS HELP	SIGN OUT
Manage Account								
Save Cancel View / Edit Income View / Edit Death Ber	efit View / Edit Actual Values							
Account name 401k		Structured Income Type				Income [Data	
Initial account balance \$100,000		Income Riders	ADD INCOME		Year	Income	Variable	
		 Start payout from income rider 			1			
Hypothetical return 3.0 %			Pick year(s) OR		3			
Bonus 0.0 %		Liquidate or annuitize	UR		4			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Account description		 Liquidate account (in so many years) 	OR		7			
Optional account company				ň	8			
Other			Start year for X years		9			
Tax calculation option Tax Income Distrit	outions (Qualified)	Withdrawals	0		10 11			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12			
Years deferred 0		Annual percentage withdrawal 0.0 %			13			
		 Required minimum distribution (RMD) 			14			
Asset plan allocation Moderate	Sel	 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end of plan		15 16			
Risk level Moderate					17			
Account owner	~		Reset all years		18			
		Calculated Plan Withdrawals	0		19			
Account type 401k	\sim	O Make-up total owners RMD from one account			20 21			
Add an income rider		 Make-up total benef RMD from one account 			22			
	Joint	 Make-up income gap based on target income 			23			
Select income rider Number of months of payout in first year	~			-	24			
Enter manual payout	12.0							
Enter manual payout		Annual Savings						
Request Additional Rider Remove Income Rider		Annual fixed savings						
Orange backgrounds indicate hypothetical returns			Note that ente	red va	lues WILL	NOT roll down to	following years v	vhen blank

Step 17: Income Data: Within the Income data table click on the Year text box that you would like to select.

)	YOUR CASE LIST SETT	INGS HELP	1
age Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
nt name	401k			1	Income Da		
account balance	\$100,000	Structured Income Type Income Riders	ADD INCOME	Yea 1		Variable	_
thetical return	3.0 %	 Start payout from income rider 	Pick year(s)	2			
S	0.0 %	Liquidate or annuitize	OR	4			
onal ccount description		Annuitize (for years certain) 1.0 % Liquidate account (in so many years)	Start year for rest of plan OR				
ptional account company ther		 Liquidate account (in so many years) 	Start year for X years				
alculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
money later - deferred account is deferred	0	Annual fixed withdrawal Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12			
t plan allocation	Moderate Sel	Required minimum distribution (RMD)	Remove year to end of plan	14			
level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 		16 17			
ount owner	~	Calculated Plan Withdrawals	Reset all years	18			
ount type an income rider	401k 🗸	O Make-up total owners RMD from one account		20			
	Client2 's age 🔘 Joint	Make-up total benef RMD from one account		22			
lect income rider mber of months of payout in first y	ear 12.0	Make-up income gap based on target income		23)
er manual payout	. 2.0	Annual Savings					
equest Additional Rider Remove l	ncome Rider	Annual fixed savings 6000					
Orange backgrounds indicate hy	pothetical returns		Note that enter	ed values	WILL NOT roll down to fe	ollowing years v	vhe

Step 18: Pick Years: Click on the green Pick Years button located at the lefthand side of the Income Data table.

					YOUR CA	SE LIST SETTI	NGS HELP	SIGN OUT
Manage Accour	1†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	401k	Structured Income Type				Income Dat	ta	
Initial account balance	\$100,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	
Hypothetical return	3.0 %		Pick year(s)		2 3			
Bonus	0.0 %	Liquidate or annuitize	OR	0	4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		6			
Account description		 Liquidate account (in so many years) 	OR		7			
Optional account company		0			8			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 11			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12			
Years deferred	0	Annual percentage withdrawal 0.0 %			13			
		 Required minimum distribution (RMD) 			14			
Asset plan allocation	Moderate Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15			
Risk level	Moderate	Beneficial IRA RMD (based on beneficiaries life)			16 17			
Stevent to a			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals	Reset all years		19			
Account type	401k ~	Make-up total owners RMD from one account			20			
Add an income rider					21			
Based on 💿 age 🔿 🛛	Client2 's age 🔘 Joint	 Make-up total benef RMD from one account 			22			
Select income rider	~	 Make-up income gap based on target income 			23 24			-
Number of months of payout in first ye				4	74			P
Enter manual payout		Annual Savings						
		Annual fixed savings 6000						
Request Additional Rider Remove In								
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red val	lues WILL N	IOT roll down to fo	llowing years w	hen blank

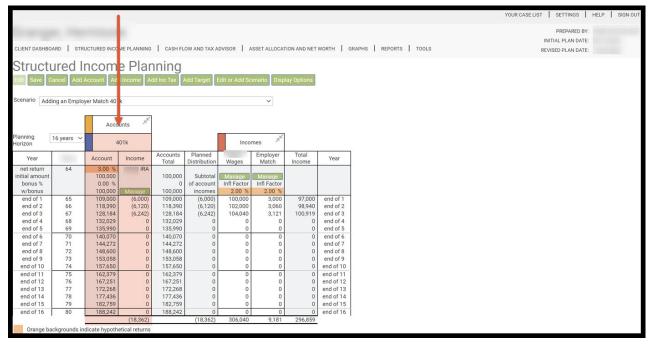
Step 19: Clicking: After clicking on the Pick Years green button, the term savings should be entered in the income column and numeric amount should be entered into the Variable column of the table. Repeat step 15 to 18 as needed.

						YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour	nt								
	View / Edit Death Benefit	/iew / Edit Actual Values					/		
	1						/		
Account name	401k		Structured Income Type				Income Data		
Initial account balance	\$100,000		Income Riders	ADD INCOME		Year Inco		Variable	-
Hypothetical return			 Start payout from income rider 	ni Kanadari kara karakari		1 savin 2	gs	6000	
Hypothetical return	3.0 %			Pick year(s) OR	ŏ	3			
Bonus	0.0 %		Liquidate or annuitize	U.V.		4			
Optional			Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Account description			O Liquidate account (in so many years)	OR		7			
Optional account company Other				Start year for X years		8			
						9 10			
Tax calculation option	Tax Income Distributions	(Qualified) ~	Withdrawals O Annual fixed withdrawal			11			
Add money later - deferred account			·	Pick year(s) to remove	ŏ	12			
Years deferred	0		Annual percentage withdrawal 0.0 %			13 14			
Asset plan allocation	Moderate	Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15			
Risk level	n Se anne the second		 Beneficial IRA RMD (based on beneficiaries life) 			16			
RISK level	Moderate					17			
Account owner	~		Calculated Plan Withdrawals	Reset all years		18 19			
Account type	401k 🗸		Make-up total owners RMD from one account		Ö	20			
Add an income rider			Make-up total benef RMD from one account			21			
Based on 💿 age 🔾 (Client2 's age 🔘 Joint		Make-up income gap based on target income			22 23			
Select income rider		~	 Make-up income gap based on target income 		00	24			-
Number of months of payout in first ye	ear	12.0			4				P
Enter manual payout			Annual Savings						
Request Additional Rider Remove Ir	ncome Rider		Annual fixed savings						
Orange backgrounds indicate hy				Note that enter	ed val	lues WILL NOT rol	down to follow	ving vears w	nen blank

Step 20: Save: Click on the green button Save underneath the Manage Account subheading.

				YOUR	CASE LIST SE	ETTINGS HELP	SIGN OUT
Manage Accour	ht						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	401k				Income	Dete	
In ial account balance	\$100,000	Structured Income Type Income Riders	ADD INCOME	Year	Income	Variable	*
	\$100,000	 Start payout from income rider 		1	savings	6000	
Hypothetical return	3.0 %		Pick year(s)	2	savings savings	6120 6242	
Bonus	0.0 %	Liquidate or annuitize	OR	4	auvinga	0242	
O <mark>r</mark> tional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan				
Account description		 Liquidate account (in so many years) 	OR	7			
Optional account company				8			
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
Acd money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	12			
Years deferred	0	O Annual percentage withdrawal 0.0 %		13			
		Required minimum distribution (RMD)		14			
As set plan allocation	Moderate Sel		Remove year to end of plan	15			
Riuk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 		16			
			Reset all years	17			
Account owner	~	Calculated Plan Withdrawals	Neber un yeuro	19			
Account type	401k ~	Make-up total owners RMD from one account		20			
Add an income rider		Make-up total benef RMD from one account		21			
Based on 💿 age 🔿 🤅	Client2 's age O Joint			22			
Select income rider	~	 Make-up income gap based on target income 		23			-
Number of months of payout in first ye	ear 12.0			.€			>
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove In	ncome Rider						
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red values WIL	L NOT roll down t	o following years wh	en blank

Step 21: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.



Step 22: Add Inc Tax: Click on the green Add Inc Tax button underneath the Structured Income Planning subheading.

Save Ca		Account Add	e Plan d Income Ad	ining			ASSET ALLOCA tenario Disp		WORTH G
ning	ing an Employ	Account Add	e Plan d Income Ad	ining			cenario Disp		WORTH G
ning	ing an Employ	Account Add	e Plan d Income Ad	ining			cenario Disp		WORTH G
ning	ing an Employ	Account Add	e Plan d Income Ad	ining			cenario Disp		WORTH G
Save Canario Addi	iancel Add A	Account Add	d Income Ad k		Add Target	Edit or Add So		lay Options	
Save Canario Addi	iancel Add A	Account Add	d Income Ad k		Add Target	Edit or Add So		lay Options	
nario Addi	ing an Employ	yer Match 401	k 🥜		Add Target	dit or Add Sc		lay Options	
ning		Accou	×	t			~		
ning		Accou	×				~		
	16 years ∽		unts 🔎	L 1					
	16 years ∽		unts						
	16 years ∨		1			_			
		4	01k			Inco	mes 🔎		
1				Acounts	Planned		Employer	Total	
Year		Account	Income	Total	Distribution	Wages	Match	Income	Year
et return	64	3.00 %	IRA						
al amount		100,000		100,000	Subtotal	Manage	Manage		
onus %		0.00 %		0	of account	Infl Factor	Infl Factor		
/bonus		100,000	Manage	100,000	incomes	2.00 %	2.00 %		
nd of 1	65	109,000	(6,000)	109,000	(6,000)	100,000	3,000	97,000	end of 1
nd of 2	66	118,390	(6,120)	118,390	(6,120)	102,000	3,060	98,940	end of 2
nd of 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	100,919	end of 3
nd of 4	68	132,029	0	132,029	0	0	0	0	end of 4
nd of 5	69	135,990	0	135,990	0	0	0	0	end of 5
nd of 6	70	140,070	0	140,070	0	0	0	0	end of 6
nd of 7	71	144,272	0	144,272	0	0	0	0	end of 7
nd of 8	72	148,600	0	148,600	0	0	0	0	end of 8
nd of 9	73	153,058	0	153,058	0	0	0	0	end of 9
nd of 10	74	157,650	0	157,650	0	0	0	0	end of 10
nd of 11	75	162,379	0	162,379	0	0	0	0	end of 11
nd of 12	76	167,251	0	167,251	0	0	0	0	end of 12
nd of 13	77	172,268	0	172,268	0	0	0	0	end of 13
nd of 14	78	177,436	0	177,436	0	0	0	0	end of 14
nd of 15	79	182,759	0	182,759	0	0	0	0	end of 15
nd of 16	80	188,242	0	188,242	0	0	0	0	end of 16
			(18,362)		(18,362)	306,040	9,181	296,859	
Orange ba	ckarounds in	dicate hypothe	etical returns						

Step 23: Use Advanced Tax Planning: Click on the green Advanced Tax Planning button underneath the Manage Tax subheading.



Step 24: Tax Name: Filter in Tax Name.

Manage Tax Save Cancel Use Basic	X Tax Planning Use Advanced Tax Planning						OUR CASE LIST		HELP SIG	GN OUT
Tax name	-			Enter Ad	ditional Tax Det	ails Not Modele	d Elsewhere In 1	This Plan		
Pre 2018 tax rate	0.0 %		ap Gains not ir Accounts Roll Down	1 Other Schedule 1 Income Roll Down	Income Adjustments Roll Down	Schedule A Override Roll Down	QBI Override Roll Down	Tax Credits Roll Down	Approx. State Tax % Roll Down	
Tax description		1								%
Filing Option	~	3 4 5 6 7 8 9 9 10 11 11 12 13 13 14 15								* * * * * * * * * * *
Create Tax Scenario for Yea	ar V	16 17 18 19 20 21 21 22 4		Note that ente	red values WILL	NOT roll down	to following yea	Ins when blank		% % % % %

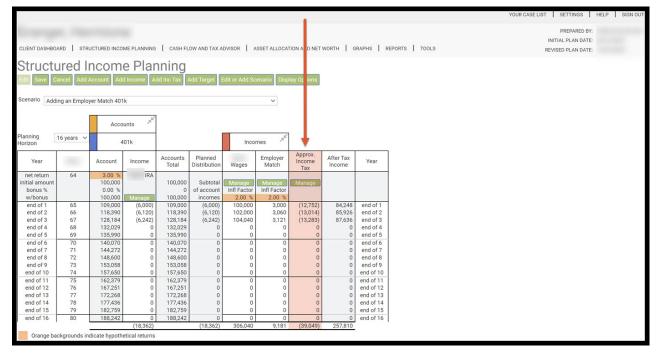
Step 25: Enter Additional Tax Details Not Modeled Elsewhere In This Plan: Enter the employer contributions in the "Other Schedule 1 Income" column as positive values. SIPS will automatically create a tax deduction for all savings added to a qualified account. We need to enter an override so the employer contributions are not being treated as a tax deduction.

							Y	OUR CASE LIST	SETTINGS	HELP SIG	GN OUT
Manage Tax											
Save Cancel Use Basic Tax	K Planning Use Advanced Tax Planning				inter Ad	ditional Tay Dat	aila Not Madala	d Elsewhere In 1	This Dian		
Tax name	Eff Tax Rate										
Pre 2018 tax rate	0.0 %	Yea	rCap Gair Acco Roll D	unts	Other Schedule 1 Income Roll Down	Income Adjustments Roll Down	Schedule A Override Roll Down	QBI Override Roll Down	Tax Credits Roll Down	Approx. State Tax % Roll Down	*
Tax description		1 2									%
Filing Option	×	3 4									% %
		5									% %
		7									%
		9 10									% %
		11									%
		13 14									%
		15									%
		17 18									%
		19 20		1							% %
Create Tax Scenario for Year	~	21 22									% % •
		4	- 9		9						•
Orange backgrounds indic	cate hypothetical returns				Note that ente	red values WILL	NOT roll down	to following yea	rs when blank		

Step 26: Save: Click the green save button underneath the Manage Tax Subheading.

						Y	OUR CASE LIST	SETTINGS	HELP SIGN	I OUT
Manage Tax										
Save Cancel Use Basic Tax	x Planning Use Advanced Tax Planning									
oure ouncer our our our	ose Advanced Tox Fidmining									
1				Enter Ad	lditional Tax Det	ails Not Modele	d Elsewhere In T	This Plan		
Ta name	Eff Tax Rate	7 <u></u>								
Pre 2018 tax rate		Yea	rCap Gains not i Accounts	n Other Schedule 1 Income	Income Adjustments	Schedule A Override	QBI Override	Tax Credits	Approx. State Tax %	-
Pit 2016 tax fate	0.0 %		Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	
Ta description		1		3000						%
		2 3		3060						%
Filing Option	~	4		3121						%
		5								%
		6								%
		7								%
		8								%
		9								%
		10								%
		11			-					70 %
		12								%
		14			-				-	%
		15								%
		16								%
		17								%
		18								%
		19								%
		20			-					%
Create Tax Scenario for Year	~	21				-				70 %
		4								
Orange backgrounds indic	cate hypothetical returns			Note that ente	ered values WILI	NOT roll down	to following yea	rs when blank		
stange sackgrounds mak	are type the terror terror the			riote that ente	nea raideo mili		to renerving yeu	o monorolarik		_

Step 27: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.



Step 28: Display Options: Click on the green Display Options button underneath the Structured Income Planning subheading.

												YOUR CASE LIST SETTINGS
												PREPARED B
												INITIAL PLAN DATI
LIENT DASHBO	DARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR /	SSET ALLOCA	TION AND NET	WORTH C	BRAPHS F	PORTS TOOLS	REVISED PLAN DATI
Struct	ured li	ncom	e Plar	nina								
					Add Target	dit or Add Sc	opario Dien	olay Options				
an Save	Add A	ACCOUNT	A		Add Target	cuit of Add Sc	Disp	nay options				
cenario Ade	ding an Employ	ver Match 401	k				~	†				
			~									
		Acco	unts 🗡									
lanning orizon	16 years ∨	4	01k			Inco	mes 📈					
Year	1000	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. ncome	After Tax Income	Year		
net return	64	3.00 %	IRA					Tax				
nitial amount		100,000		100,000	Subtotal	Manage	Manage	/anage				
bonus %		0.00 %		0	of account	Infl Factor	Infl Factor					
w/bonus end of 1	65	100,000	Manage (6,000)	100,000	incomes (6,000)	2.00 %	2.00 %	(12,752)	84,248	end of 1		
end of 2	66	118,390	(6,120)	118,390	(6,120)	102,000	3,060	(13,014)	85,926	end of 2		
end of 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)	87,636	end of 3		
end of 4	68	132,029	0	132,029	0	0	0	0	0	end of 4		
end of 5	69	135,990	0	135,990	0	0	0	0	0	end of 5		
end of 6	70	140,070	0	140,070	0	0	0	0	0	end of 6		
end of 7	71	144,272	0	144,272	0	0	0	0	0	end of 7		
end of 8	72	148,600	0	148,600	0	0	0	0	0	end of 8		
end of 9	73	153,058	0	153,058	0	0	0	0	0	end of 9		
end of 10	74	157,650	0	157,650	0	0	0	0	0	end of 10		
end of 11	75 76	162,379	0	162,379	0	0	0	0	0	end of 11		
end of 12 end of 13	76	167,251 172,268	0	167,251 172,268	0	0	0	0	0	end of 12 end of 13		
end of 13 end of 14	78	172,268	0	172,268	0	0	0	0	0	end of 13 end of 14		
end of 14 end of 15	78	177,436	0	177,436	0	0	0	0	0	end of 14 end of 15		
end of 16	80	188,242	0	188,242	0	0	0	0	0	end of 16		
	1 30 1	100,242	(18,362)	100,242	(18,362)	306,040	9,181	(39,049)	257,810			
	ackgrounds inc	P			(10,002)	000,040	2,101	(02,043)	207,010	8		

Step 29: View Tax Rates: Click on the green View Tax Rates button in the Column Display Options.

Column Display Options View RMD Checks Hide Incon	ne Riders View	Death Benefit	View % Distr	ibution View	Comparison	View Ta	ax Rates View	Calendar Years		
							r			
Account and	Income Grou	ping						Group Setup		
Ad	ccounts							Accounts		
	Group 1	Group 2	Group 3	Group 4	Group 5		Title		Color	
401k	\bigcirc	0	0	0	0	Grou				Sel
						Grou				Sel
Wages	ncomes	0	\bigcirc	0	\bigcirc	Grou	1			Sel
Employer Match		0	0	0	0	Grou				Sel
Employer Match		0	0	0	0	Grou	5			Sel
Account or income groups must be created in the sequential order fr	rom left to right a	s they appear i	n the Income F	Plan.				Incomes		
You may have to re-order accounts using the Edit Scenario function t	to achieve the sec	uence you wa	nt for your acc	ount/income	groups.		Title	incomes	Color	
Reordering or adding accounts or incomes on the Edit Scenario func	tion requires that	the above gro	up information	be reset.		Grou				Sel
						Grou				Sel
Reset Condense All Uncondense All						Grou				Sel
						Grou	4			Sel
						Group				Sel
						Res	et Title / Colors	Copy Setup To All Scenarios		
										_
Return With Grouping Return Without Grouping										
Recard Marolouping										

Step 30: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

												YOUR CASE LIST SETTINGS
												PREPARED
												INITIAL PLAN DAT
ENT DASHB	OARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET W	ORTH GR	APHS REI	PORTS TOOLS	REVISED PLAN DAT
	unadi											
	ured I											
Save	Cancel Add.	Account Ad	d Income A	dd Inc Tax	Add Target	dit or Add So	cenario Disp	olay Options				
narie Ad	ding an Emplo	yer Match 401	k				~					
			K	i.								
- I -		Acco	unts									
nning rizon	16 years ~	4	01k			Inco	mes 🔎					
Yea		Account	Income	Accounts	Planned		Employer	Approx.	After Tax	Year		
et re urn	64	3.00 %	IRA	Total	Distribution	Wages	Match	Income Tax	Income	rear		
ial ar jount		100,000	IRA	100.000	Subtotal	Manage	Manage	Manage				
bonu %		0.00 %		0	of account	Infl Factor	Infl Factor	Eff Tax Rate				
w/bo us		100,000	Manage	100,000	incomes	2.00 %	2.00 %					
end c 1	65	109,000	(6,000)	109,000	(6,000)	100,000	3,000	(12,752)-13%	84,248	end of 1		
end of 2	66	118,390	(6,120)	118,390	(6,120)	102,000	3,060	(13,014)-13%	85,926	end of 2		
end c 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)-13%	87,636	end of 3		
end c 4 end c 5	68 69	132,029 135,990	0	132,029 135,990	0	0	0	0-0%	0	end of 4 end of 5		
end c 6	70	140,070	0	140,070	0	0	0	0-0%	0	end of 6		
end d 7	71	144,272	0	144,272	Ö	0	0	0-0%	0	end of 7		
nd c 8	72	148,600	0	148,600	ő	0	0	0-0%	0	end of 8		
nd or 9	73	153,058	0	153,058	0	0	0	0-0%	0	end of 9		
nd of 10	74	157,650	0	157,650	0	0	0	0-0%	0	end of 10		
nd of 11	75	162,379	0	162,379	0	0	0	0-0%	0	end of 11		
nd of 12	76	167,251	0	167,251	0	0	0	0-0%	0	end of 12		
d of 13	77	172,268	0	172,268	0	0	0	0-0%	0	end of 13		
of 14	78	177,436	0	177,436	0	0	0	0-0%	0	end of 14		
	79	182,759	0	182,759	0	0	0	0-0%	0	end of 15		
nd of 15			0	188.242	0	0	0	0-0%	0	end of 16		
end of 15 end of 16	80	188,242	(18,362)	100,242	(18,362)	306,040	9,181	(39,049)	257,810	cita or ro		

Step 31: 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 SETTI
											PREP
											INITIAL PLA
LIENT DASHBO	ARD STRU	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET W	ORTH GR	APHS REP	PORTS TOOLS REVISED PLA
truct	ured li	ncom	e Plar	nnina							
dit Dynamic				0							
enario Add	ling an Employ	yer Match 401	k				~				
	1		کر	1							
		Acco	unts								
nning rizon	16 years ∨	4	01k			Inco	mes 🗡				
Year		Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year	
net return	64	3.00 %	IRA		Distribution	rugeo		integration fait			
tial amount		100,000		100,000	Subtotal						
bonus %		0.00 %		0	of account	Infl Factor	Infl Factor	Eff Tax Rate			
w/bonus		100,000		100,000	incomes	2.00 %	2.00 %				
end of 1	65 66	109,000	(6,000)	109,000	(6,000)	100,000		(12,752)-13%	84,248	end of 1	
end of 2 end of 3	67	118,390 128,184	(6,120) (6,242)	118,390 128,184	(6,120) (6,242)	102,000 104,040		(13,014)-13% (13,283)-13%	85,926 87,636	end of 2 end of 3	
end of 3 end of 4	68	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)-13%	87,030	end of 3 end of 4	
end of 5	69	132,029	0	135,990	0	0	0	0-0%	0	end of 5	
end of 6	70	140,070	0	140,070	0	0	0	0-0%	0	end of 6	1
end of 7	71	144,272	0	144,272	ő	0	0	0-0%	0	end of 7	
end of 8	72	148,600	0	148,600	0	0	0	0-0%	0	end of 8	
end of 9	73	153,058	0	153,058	0	0	0	0-0%	0	end of 9	
end of 10	74	157,650	0	157,650	0	0	0	0-0%	0	end of 10	
end of 11	75	162,379	0	162,379	0	0	0	0-0%	0	end of 11	1
end of 12	76	167,251	0	167,251	0	0	0	0-0%	0	end of 12	
end of 13	77	172,268	0	172,268	0	0	0	0-0%	0	end of 13	
	78	177,436	0	177,436	0	0	0	0-0%	0	end of 14	
end of 14	79	182,759	0	182,759	0	0	0	0-0%	0	end of 15]
end of 15			0	188,242	0	0	0	0-0%	0	end of 16	
	80	188,242	(18,362)	100,242	(18,362)	306,040	9,181	(39,049)	257,810		1

Step 32: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

CLIENT DASHBO/				Lougur				TION AND NET W		APHS REI
CLIENT DASHBOA	ARD STR	UCTORED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSETALLUCA	HON AND NET W	UKIH GR	APHS REI
Structu	Irod I	ncom	o Dlar	nina						
Structt										
Edit Save Ca	ancel Add.	Account Add	d Income A	dd Inc Tax	Add Target		enario Disp	lay Options		
Scenario Addi	an Emplo	yer Match 401	k				~			
		Acco	unts							
Planning	years 🗸		01k			Inco				
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Year	1000	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %	IRA	Total	Distribution	wages	watch	income tax	income	So (Son)
initial amount		100,000		100,000	Subtotal	Manage	Manage	Manage		
bonus %		0.00 %		0	of account	Infl Factor	Infl Factor	Eff Tax Rate		
w/bonus		100,000	Manage	100,000	incomes	2.00 %	2.00 %	(
end of 1 end of 2	65 66	109,000 118,390	(6,000) (6,120)	109,000 118,390	(6,000) (6,120)	100,000 102,000	3,000 3,060	(12,752)-13% (13,014)-13%	84,248 85,926	end of 1 end of 2
end of 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)-13%	87,636	end of 3
end of 4	68	132.029	0	132,029	0	0	0	0-0%	0	end of 4
end of 5	69	135,990	0	135,990	0	0	0	0-0%	0	end of 5
end of 6	70	140,070	0	140,070	0	0	0	0-0%	0	end of 6
end of 7	71	144,272	0	144,272	0	0	0	0-0%	0	end of 7
end of 8 end of 9	72	148,600 153,058	0	148,600 153,058	0	0	0	0-0%	0	end of 8 end of 9
end of 10	74	153,058	0	153,058	0	0	0	0-0%	0	end of 10
end of 11	75	162,379	0	162,379	0	0	0	0-0%	0	end of 11
end of 12	76	167,251	0	167,251	Ő	0	0	0-0%	0	end of 12
end of 13	77	172,268	0	172,268	0	0	0	0-0%	0	end of 13
end of 14	78	177,436	0	177,436	0	0	0	0-0%	0	end of 14
end of 15	79	182,759	0	182,759	0	0	0	0-0%	0	end of 15
end of 16	80	188,242	0 (18,362)	188,242	(18,362)	0 306,040	9,181	0-0%	257,810	end of 16
Ommer	dimensional	diants have at			(10,302)	300,040	9,181	(39,049)	237,010	
Urange bac	exgrounds in	dicate hypothe	eticai returns	2						

Step 33: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

LILLEN DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS TOOLS TOOLS REVISED PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS TOOLS TOOLS Determine the termine the termine the termine ter														YOUR CASE LIST SETTINGS
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					(18,362)		(18,362)	306,040	9,181	(39,049)	257,810			

