

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

01/12/2026 10:55 am EST

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

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Structured Income Planning

Edit | Dynamic Mode

Scenario: Adding an Employer Match 401k

Planning Horizon: 16 years

Accounts: 401k

Incomes

	Year	Account	Income	Accounts Total	Planned Distribution	Wages	Total Income	Year
net return	64	3.00 %	IRA	100,000	Subtotal	100,000	100,000	end of 1
initial amount		100,000		0	of account	102,000	102,000	end of 2
bonus %		0.00 %		100,000	incomes	104,040	104,040	end of 3
w/bonus		100,000				0	0	end of 4
						0	0	end of 5
end of 1	65	103,000	0	103,000	0	0	0	end of 6
end of 2	66	106,090	0	106,090	0	0	0	end of 7
end of 3	67	109,273	0	109,273	0	0	0	end of 8
end of 4	68	112,551	0	112,551	0	0	0	end of 9
end of 5	69	115,927	0	115,927	0	0	0	end of 10
end of 6	70	119,405	0	119,405	0	0	0	end of 11
end of 7	71	122,987	0	122,987	0	0	0	end of 12
end of 8	72	126,677	0	126,677	0	0	0	end of 13
end of 9	73	130,477	0	130,477	0	0	0	end of 14
end of 10	74	134,392	0	134,392	0	0	0	end of 15
end of 11	75	138,423	0	138,423	0	0	0	end of 16
end of 12	76	142,576	0	142,576	0	0	0	
end of 13	77	146,853	0	146,853	0	0	0	
end of 14	78	151,259	0	151,259	0	0	0	
end of 15	79	155,797	0	155,797	0	0	0	
end of 16	80	160,471	0	160,471	0	0	0	
		0		0		306,040	306,040	

Orange backgrounds indicate hypothetical returns

Step 2: Add Income: Click on the green Add Income 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: Adding an Employer Match 401K

Planning Horizon: 16 years

Accounts

Incomes

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Total Income	Year
net return	64	3.00 %	100,000	0	100,000	100,000	
initial amount		0.00 %	100,000	0	100,000	100,000	
bonus %		0.00 %	100,000	0	100,000	100,000	
w/bonus		0.00 %	100,000	0	100,000	100,000	
end of 1	65	103,000	103,000	0	100,000	100,000	end of 1
end of 2	66	106,090	106,090	0	102,000	102,000	end of 2
end of 3	67	109,273	109,273	0	104,040	104,040	end of 3
end of 4	68	112,551	112,551	0	0	0	end of 4
end of 5	69	115,927	115,927	0	0	0	end of 5
end of 6	70	119,405	119,405	0	0	0	end of 6
end of 7	71	122,987	122,987	0	0	0	end of 7
end of 8	72	126,677	126,677	0	0	0	end of 8
end of 9	73	130,477	130,477	0	0	0	end of 9
end of 10	74	134,392	134,392	0	0	0	end of 10
end of 11	75	138,423	138,423	0	0	0	end of 11
end of 12	76	142,576	142,576	0	0	0	end of 12
end of 13	77	146,853	146,853	0	0	0	end of 13
end of 14	78	151,259	151,259	0	0	0	end of 14
end of 15	79	155,797	155,797	0	0	0	end of 15
end of 16	80	160,471	160,471	0	0	0	end of 16
		0	0	0	306,040	306,040	

Orange backgrounds indicate hypothetical returns

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

## Manage Income

Save

Cancel

Other income name

This is a Social Security income

First year income

Inflation rate

Number of months of income in first year

Income description

Delay the income start until age

Age to begin income

Tax calculation option

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	
22	
23	
24	

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save

Cancel

Other income name

Employer Match

This is a Social Security income

☐

First year income

Inflation rate

0.0 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

☒ Client 1 age
 ☐ Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	
22	
23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save

Cancel

Other income name

Employer Match

This is a Social Security income

☐

First year income

3,000

Inflation rate

0.0 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

☒ Client 1 age
 ☐ Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
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17	
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21	
22	
23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values 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

Save

Cancel

Other income name

Employer Match

This is a Social Security income

☐

First year income

3,000

Inflation rate

2 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

☒ Client 1 age
 ☐ Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
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23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save

Cancel

Other income name

Employer Match

This is a Social Security income

☐

First year income

3,000

Inflation rate

2 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

☒ Client 1 age
 ☐ Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
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24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save Cancel

Other income name

Employer Match

This is a Social Security income

☐

First year income

3,000

Inflation rate

2 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

Client 1 age Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

0

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
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23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Income

Save Cancel

Other income name

Employer Match

This is a Social Security income

☐

First year income

3,000

Inflation rate

2 %

Number of months of income in first year

12.0

Income description

Delay the income start until age

☐

Age to begin income

0

Client 1 age Client 2 age

Tax calculation option

Not Taxable

ADD ADJUSTMENT

0

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
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24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down 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](#)

Other income name:

This is a Social Security income: ☐

First year income:

Inflation rate:  %

Number of months of income in first year:

Income description:

Delay the income start until age: ☐

Age to begin income:  ☒ Client 1 age ☐ Client 2 age

Tax calculation option:

ADD ADJUSTMENT:

[Pick year\(s\)](#)

[Pick year\(s\) to remove](#)

[Reset all years](#)

### Income Adjustments

Year	Income adjustment
1	
2	
3	
4	0
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	
22	
23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Income

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

Other income name:

This is a Social Security income: ☐

First year income:

Inflation rate:  %

Number of months of income in first year:

Income description:

Delay the income start until age: ☐

Age to begin income:  ☒ Client 1 age ☐ Client 2 age

Tax calculation option:

ADD ADJUSTMENT:

[Pick year\(s\)](#)

[Pick year\(s\) to remove](#)

[Reset all years](#)

### Income Adjustments

Year	Income adjustment
1	
2	
3	
4	0
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	
22	
23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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## Structured Income Planning

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

Scenario: Adding an Employer Match 401k

Planning Horizon: 16 years

Accounts: 401k

Incomes

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Total Income	Year
net return	64	3.00 %	IRA	100,000	Subtotal of account incomes	Manage 2.00 %	Manage 2.00 %	
initial amount		100,000	100,000	0	100,000	3,000	103,000	end of 1
bonus %		0.00 %		0	102,000	3,060	105,060	end of 2
w/bonus		100,000	100,000	0	104,040	3,121	107,161	end of 3
end of 1	65	103,000	0	103,000	0	0	0	end of 4
end of 2	66	106,090	0	106,090	0	0	0	end of 5
end of 3	67	109,273	0	109,273	0	0	0	end of 6
end of 4	68	112,551	0	112,551	0	0	0	end of 7
end of 5	69	115,927	0	115,927	0	0	0	end of 8
end of 6	70	119,405	0	119,405	0	0	0	end of 9
end of 7	71	122,987	0	122,987	0	0	0	end of 10
end of 8	72	126,677	0	126,677	0	0	0	end of 11
end of 9	73	130,477	0	130,477	0	0	0	end of 12
end of 10	74	134,392	0	134,392	0	0	0	end of 13
end of 11	75	138,423	0	138,423	0	0	0	end of 14
end of 12	76	142,576	0	142,576	0	0	0	end of 15
end of 13	77	146,853	0	146,853	0	0	0	end of 16
end of 14	78	151,259	0	151,259	0	0	0	
end of 15	79	155,797	0	155,797	0	0	0	
end of 16	80	160,471	0	160,471	0	0	0	
		0	0	0	306,040	9,181	315,221	

Orange backgrounds indicate hypothetical returns

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

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: Adding an Employer Match 401k

Planning Horizon: 16 years

Accounts: 401k

Incomes

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Total Income	Year
net return	64	3.00 %	IRA	100,000	Subtotal of account incomes	Manage 2.00 %	Manage 2.00 %	
initial amount		100,000	100,000	0	100,000	3,000	103,000	end of 1
bonus %		0.00 %		0	102,000	3,060	105,060	end of 2
w/bonus		100,000	100,000	0	104,040	3,121	107,161	end of 3
end of 1	65	103,000	0	103,000	0	0	0	end of 4
end of 2	66	106,090	0	106,090	0	0	0	end of 5
end of 3	67	109,273	0	109,273	0	0	0	end of 6
end of 4	68	112,551	0	112,551	0	0	0	end of 7
end of 5	69	115,927	0	115,927	0	0	0	end of 8
end of 6	70	119,405	0	119,405	0	0	0	end of 9
end of 7	71	122,987	0	122,987	0	0	0	end of 10
end of 8	72	126,677	0	126,677	0	0	0	end of 11
end of 9	73	130,477	0	130,477	0	0	0	end of 12
end of 10	74	134,392	0	134,392	0	0	0	end of 13
end of 11	75	138,423	0	138,423	0	0	0	end of 14
end of 12	76	142,576	0	142,576	0	0	0	end of 15
end of 13	77	146,853	0	146,853	0	0	0	end of 16
end of 14	78	151,259	0	151,259	0	0	0	
end of 15	79	155,797	0	155,797	0	0	0	
end of 16	80	160,471	0	160,471	0	0	0	
		0	0	0	306,040	9,181	315,221	

Orange backgrounds indicate hypothetical returns

Step 14: Tax Calculation Option: Click on the down carrot arrow and select Tax Income Distributions (Qualified).

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Account

Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values

Account name: 401k

Initial account balance: \$100,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional

Account description

Optional account company

Other

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account

Years deferred: 0

Asset plan allocation: Moderate

Risk level: Moderate

Account owner: [dropdown]

Account type: 401k

Add an income rider

Based on: [radio] age [radio] Client2's age [radio] Joint

Select income rider: [dropdown]

Number of months of payout in first year: 12.0

Enter manual payout: [checkbox]

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

### Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) 1.0 %

☐ Liquidate account (in so many years)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Account

Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values

Account name: 401k

Initial account balance: \$100,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional

Account description

Optional account company

Other

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account

Years deferred: 0

Asset plan allocation: Moderate

Risk level: Moderate

Account owner: [dropdown]

Account type: 401k

Add an income rider

Based on: [radio] age [radio] Client2's age [radio] Joint

Select income rider: [dropdown]

Number of months of payout in first year: 12.0

Enter manual payout: [checkbox]

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

### Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) 1.0 %

☐ Liquidate account (in so many years)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
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21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

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



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Account

[Save](#)
[Cancel](#)
[View / Edit Income](#)
[View / Edit Death Benefit](#)
[View / Edit Actual Values](#)

Account name: 401k  
 Initial account balance: \$100,000  
 Hypothetical return: 3.0 %  
 Bonus: 0.0 %  
 Optional:  
 Account description:  
 Optional account company:  
 Other:  
 Tax calculation option: Tax Income Distributions (Qualified)  
 Add money later - deferred account:  
 Years deferred: 0  
 Asset plan allocation: Moderate  
 Risk level: Moderate  
 Account owner:  
 Account type: 401k  
 Add an income rider:  
 Based on: age Client2's age Joint  
 Select income rider:  
 Number of months of payout in first year: 12.0  
 Enter manual payout:  
[Request Additional Rider](#)
[Remove Income Rider](#)  
 Orange backgrounds indicate hypothetical returns

**Structured Income Type**  
 Income Riders  
☐ Start payout from income rider  
 Liquidate or annuitize  
☐ Annuitize (for years certain) 1.0 %  
☐ Liquidate account (in so many years)  
 Withdrawals  
☐ Annual fixed withdrawal  
☐ Annual percentage withdrawal 0.0 %  
☐ Required minimum distribution (RMD)  
☐ Beneficial IRA RMD (based on beneficiaries life)  
 Calculated Plan Withdrawals  
☐ Make-up total owners RMD from one account  
☐ Make-up total benef RMD from one account  
☐ Make-up income gap based on target income  
 Annual Savings  
☒ Annual fixed savings

**ADD INCOME**  
[Pick year\(s\)](#)  
 OR  
[Start year for rest of plan](#)  
 OR  
[Start year for X years](#)  
 0  
[Pick year\(s\) to remove](#)  
[Remove year to end of plan](#)  
[Reset all years](#)

Income Data		
Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
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21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when 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 | SETTINGS | HELP | SIGN OUT

## Manage Account

[Save](#)
[Cancel](#)
[View / Edit Income](#)
[View / Edit Death Benefit](#)
[View / Edit Actual Values](#)

Account name: 401k  
 Initial account balance: \$100,000  
 Hypothetical return: 3.0 %  
 Bonus: 0.0 %  
 Optional:  
 Account description:  
 Optional account company:  
 Other:  
 Tax calculation option: Tax Income Distributions (Qualified)  
 Add money later - deferred account:  
 Years deferred: 0  
 Asset plan allocation: Moderate  
 Risk level: Moderate  
 Account owner:  
 Account type: 401k  
 Add an income rider:  
 Based on: age Client2's age Joint  
 Select income rider:  
 Number of months of payout in first year: 12.0  
 Enter manual payout:  
[Request Additional Rider](#)
[Remove Income Rider](#)  
 Orange backgrounds indicate hypothetical returns

**Structured Income Type**  
 Income Riders  
☐ Start payout from income rider  
 Liquidate or annuitize  
☐ Annuitize (for years certain) 1.0 %  
☐ Liquidate account (in so many years)  
 Withdrawals  
☐ Annual fixed withdrawal  
☐ Annual percentage withdrawal 0.0 %  
☐ Required minimum distribution (RMD)  
☐ Beneficial IRA RMD (based on beneficiaries life)  
 Calculated Plan Withdrawals  
☐ Make-up total owners RMD from one account  
☐ Make-up total benef RMD from one account  
☐ Make-up income gap based on target income  
 Annual Savings  
☒ Annual fixed savings 6000

**ADD INCOME**  
[Pick year\(s\)](#)  
 OR  
[Start year for rest of plan](#)  
 OR  
[Start year for X years](#)  
 0  
[Pick year\(s\) to remove](#)  
[Remove year to end of plan](#)  
[Reset all years](#)

Income Data		
Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Account

Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values

Account name: 401k

Initial account balance: \$100,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional:

Account description:

Optional account company:

Other:

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account:

Years deferred: 0

Asset plan allocation: Moderate

Risk level: Moderate

Account owner:

Account type: 401k

Add an income rider:

Based on: age Client's age Joint

Select income rider:

Number of months of payout in first year: 12.0

Enter manual payout:

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) 1.0 %

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal 0.0 %

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☒ Annual fixed savings 6000

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

0

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when 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 Account

Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values

Account name: 401k

Initial account balance: \$100,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional:

Account description:

Optional account company:

Other:

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account:

Years deferred: 0

Asset plan allocation: Moderate

Risk level: Moderate

Account owner:

Account type: 401k

Add an income rider:

Based on: age Client's age Joint

Select income rider:

Number of months of payout in first year: 12.0

Enter manual payout:

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) 1.0 %

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal 0.0 %

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

0

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1	Income savings	6000
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

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



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY:   
 INITIAL PLAN DATE:   
 REVISED PLAN DATE:

## Structured Income Planning

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

Scenario: Adding an Employer Match 401k

Planning Horizon: 16 years

Accounts		Incomes	
Year	Account	Income	Year
net return	64	3.00 %	IRA
initial amount		100,000	
bonus %		0.00 %	
w/bonus		100,000	
		Manage	
end of 1	65	109,000	(6,000)
end of 2	66	118,390	(6,120)
end of 3	67	128,184	(6,242)
end of 4	68	132,029	0
end of 5	69	135,990	0
end of 6	70	140,070	0
end of 7	71	144,272	0
end of 8	72	148,600	0
end of 9	73	153,058	0
end of 10	74	157,650	0
end of 11	75	162,379	0
end of 12	76	167,251	0
end of 13	77	172,268	0
end of 14	78	177,436	0
end of 15	79	182,759	0
end of 16	80	188,242	0
		(18,362)	(18,362)
			306,040
			9,181
			296,859

Orange backgrounds indicate hypothetical returns

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Tax

Save Cancel Use Basic Tax Planning Use Advanced Tax Planning

Tax name:

Starting effective tax rate:  %

Tax description:

Tax Adjustments

ADD ADJUSTMENT

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

Pick year(s) to remove

Remove year to end of plan

Reset all years

Year	Tax adjustment
1	%
2	%
3	%
4	%
5	%
6	%
7	%
8	%
9	%
10	%
11	%
12	%
13	%
14	%
15	%
16	%
17	%
18	%
19	%
20	%
21	%
22	%
23	%
24	%

Orange backgrounds indicate hypothetical returns

Note that entered values WILL NOT roll down to following years when blank

Step 24: Tax Name: Filter in Tax Name.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Tax

[Save](#)
[Cancel](#)
[Use Basic Tax Planning](#)
[Use Advanced Tax Planning](#)

Enter Additional Tax Details Not Modeled Elsewhere In This Plan

Tax name

Pre 2018 tax rate  %

Tax description

Filing Option

[Create Tax Scenario for Year](#)

Orange backgrounds indicate hypothetical returns

Year	Cap Gains not in Accounts	Other Schedule 1 Income	Income Adjustments	Schedule A Override	QBI Override	Tax Credits	Approx. State Tax %
1	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							

Note that entered values WILL NOT roll down to following years 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Tax

[Save](#)
[Cancel](#)
[Use Basic Tax Planning](#)
[Use Advanced Tax Planning](#)

Enter Additional Tax Details Not Modeled Elsewhere In This Plan

Tax name

Pre 2018 tax rate  %

Tax description

Filing Option

[Create Tax Scenario for Year](#)

Orange backgrounds indicate hypothetical returns

Year	Cap Gains not in Accounts	Other Schedule 1 Income	Income Adjustments	Schedule A Override	QBI Override	Tax Credits	Approx. State Tax %
1	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							

Note that entered values WILL NOT roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Manage Tax

Save

Cancel

Use Basic Tax Planning

Use Advanced Tax Planning

Ta name

Eff Tax Rate

Pr 2018 tax rate

0.0 %

Ta description

Filing Option

Create Tax Scenario for Year

Orange backgrounds indicate hypothetical returns

Enter Additional Tax Details Not Modeled Elsewhere in This Plan

Year	Cap Gains not in Other Accounts	Schedule 1 Income	Income Adjustments	Schedule A Override	QBI Override	Tax Credits	Approx. State Tax %
1	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down	Roll Down
2		3000					%
3		3060					%
4		3121					%
5							%
6							%
7							%
8							%
9							%
10							%
11							%
12							%
13							%
14							%
15							%
16							%
17							%
18							%
19							%
20							%
21							%
22							%

Note that entered values WILL NOT roll down to following years when blank

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

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

GRAPHS

REPORTS

TOOLS

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

Scenario

Adding an Employer Match 401k

Planning Horizon

16 years

Accounts

401k

Incomes

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %	IRA						
initial amount		100,000	100,000	0					
bonus % w/bonus		0.00 %	100,000	Subtotal of account incomes	Manage Inft Factor	Manage Inft Factor	Manage		
end of 1	65	109,000	(6,000)	109,000	(6,000)	100,000	3,000	(12,752)	84,248
end of 2	66	118,390	(6,120)	118,390	(6,120)	102,000	3,060	(13,014)	85,926
end of 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)	87,636
end of 4	68	132,029	0	132,029	0	0	0	0	0
end of 5	69	135,990	0	135,990	0	0	0	0	0
end of 6	70	140,070	0	140,070	0	0	0	0	0
end of 7	71	144,272	0	144,272	0	0	0	0	0
end of 8	72	148,600	0	148,600	0	0	0	0	0
end of 9	73	153,058	0	153,058	0	0	0	0	0
end of 10	74	157,650	0	157,650	0	0	0	0	0
end of 11	75	162,379	0	162,379	0	0	0	0	0
end of 12	76	167,251	0	167,251	0	0	0	0	0
end of 13	77	172,268	0	172,268	0	0	0	0	0
end of 14	78	177,436	0	177,436	0	0	0	0	0
end of 15	79	182,759	0	182,759	0	0	0	0	0
end of 16	80	188,242	0	188,242	0	0	0	0	0
		(18,362)	(18,362)	306,040	9,181	(39,049)	257,810		

Orange backgrounds indicate hypothetical returns

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



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

## Structured Income Planning

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

Scenario: Adding an Employer Match 401k

Planning Horizon: 16 years

Accounts: 401k

Incomes:

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %							
initial amount		100,000	100,000	Subtotal of account incomes	Manage Inf Factor	Manage Inf Factor	Manage		
bonus % w/bonus		0.00 %	0		2.00 %	2.00 %			
end of 1	65	109,000	109,000	(6,000)	100,000	3,000	(12,752)	84,248	end of 1
end of 2	66	118,390	118,390	(6,120)	102,000	3,060	(13,014)	85,926	end of 2
end of 3	67	128,184	128,184	(6,242)	104,040	3,121	(13,283)	87,636	end of 3
end of 4	68	132,029	132,029	0	0	0	0	0	end of 4
end of 5	69	135,990	135,990	0	0	0	0	0	end of 5
end of 6	70	140,070	140,070	0	0	0	0	0	end of 6
end of 7	71	144,272	144,272	0	0	0	0	0	end of 7
end of 8	72	148,600	148,600	0	0	0	0	0	end of 8
end of 9	73	153,058	153,058	0	0	0	0	0	end of 9
end of 10	74	157,650	157,650	0	0	0	0	0	end of 10
end of 11	75	162,379	162,379	0	0	0	0	0	end of 11
end of 12	76	167,251	167,251	0	0	0	0	0	end of 12
end of 13	77	172,268	172,268	0	0	0	0	0	end of 13
end of 14	78	177,436	177,436	0	0	0	0	0	end of 14
end of 15	79	182,759	182,759	0	0	0	0	0	end of 15
end of 16	80	188,242	188,242	0	0	0	0	0	end of 16
		(18,362)	(18,362)	306,040	9,181	(39,049)	257,810		

Orange backgrounds indicate hypothetical returns

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 Income Riders

View Death Benefit

View % Distribution

View Comparison

**View Tax Rates**

View Calendar Years

Account and Income Grouping

401k

Wages

Employer Match

Accounts

Group 1

Group 2

Group 3

Group 4

Group 5

Incomes

Group 1

Group 2

Group 3

Group 4

Group 5

Account or income groups must be created in the sequential order from left to right as they appear in the Income Plan.  
You may have to re-order accounts using the Edit Scenario function to achieve the sequence you want for your account/income groups.  
Reordering or adding accounts or incomes on the Edit Scenario function requires that the above group information be reset.

Reset

Condense All

Uncondense All

Group Setup

Accounts

Title

Group 1

Group 2

Group 3

Group 4

Group 5

Incomes

Title

Group 1

Group 2

Group 3

Group 4

Group 5

Reset Title / Colors

Copy Setup To All Scenarios

Return With Grouping

Return Without Grouping

Step 30: 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: Adding an Employer Match 401k

Planning Horizon: 16 years

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %	100,000	0	100,000	3,000	(12,752)-13%	84,248	end of 1
initial amount		0.00 %	100,000	0	100,000	3,060	(13,014)-13%	85,926	end of 2
bonus % w/bonus		100,000	100,000	100,000	104,040	3,121	(13,283)-13%	87,636	end of 3
end of 1	65	109,000	(6,000)	109,000	0	0	0-0%	0	end of 4
end of 2	66	118,390	(6,120)	118,390	0	0	0-0%	0	end of 5
end of 3	67	128,184	(6,242)	128,184	0	0	0-0%	0	end of 6
end of 4	68	132,029	0	132,029	0	0	0-0%	0	end of 7
end of 5	69	135,990	0	135,990	0	0	0-0%	0	end of 8
end of 6	70	140,070	0	140,070	0	0	0-0%	0	end of 9
end of 7	71	144,272	0	144,272	0	0	0-0%	0	end of 10
end of 8	72	148,600	0	148,600	0	0	0-0%	0	end of 11
end of 9	73	153,058	0	153,058	0	0	0-0%	0	end of 12
end of 10	74	157,650	0	157,650	0	0	0-0%	0	end of 13
end of 11	75	162,379	0	162,379	0	0	0-0%	0	end of 14
end of 12	76	167,251	0	167,251	0	0	0-0%	0	end of 15
end of 13	77	172,268	0	172,268	0	0	0-0%	0	end of 16
end of 14	78	177,436	0	177,436	0	0	0-0%	0	
end of 15	79	182,759	0	182,759	0	0	0-0%	0	
end of 16	80	188,242	0	188,242	0	0	0-0%	0	
		(18,362)		(18,362)	306,040	9,181	(39,049)	257,810	

Orange backgrounds indicate hypothetical returns

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 | 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: Adding an Employer Match 401k

Planning Horizon: 16 years

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %	100,000	0	100,000	3,000	(12,752)-13%	84,248	end of 1
initial amount		0.00 %	100,000	0	100,000	3,060	(13,014)-13%	85,926	end of 2
bonus % w/bonus		100,000	100,000	100,000	104,040	3,121	(13,283)-13%	87,636	end of 3
end of 1	65	109,000	(6,000)	109,000	0	0	0-0%	0	end of 4
end of 2	66	118,390	(6,120)	118,390	0	0	0-0%	0	end of 5
end of 3	67	128,184	(6,242)	128,184	0	0	0-0%	0	end of 6
end of 4	68	132,029	0	132,029	0	0	0-0%	0	end of 7
end of 5	69	135,990	0	135,990	0	0	0-0%	0	end of 8
end of 6	70	140,070	0	140,070	0	0	0-0%	0	end of 9
end of 7	71	144,272	0	144,272	0	0	0-0%	0	end of 10
end of 8	72	148,600	0	148,600	0	0	0-0%	0	end of 11
end of 9	73	153,058	0	153,058	0	0	0-0%	0	end of 12
end of 10	74	157,650	0	157,650	0	0	0-0%	0	end of 13
end of 11	75	162,379	0	162,379	0	0	0-0%	0	end of 14
end of 12	76	167,251	0	167,251	0	0	0-0%	0	end of 15
end of 13	77	172,268	0	172,268	0	0	0-0%	0	end of 16
end of 14	78	177,436	0	177,436	0	0	0-0%	0	
end of 15	79	182,759	0	182,759	0	0	0-0%	0	
end of 16	80	188,242	0	188,242	0	0	0-0%	0	
		(18,362)		(18,362)	306,040	9,181	(39,049)	257,810	

Orange backgrounds indicate hypothetical returns

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.



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: Adding an Employer Match 401k

Planning Horizon: 1 years

Accounts: 401k

Incomes:

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %							
initial amount	100,000		100,000						
bonus %	0.00 %		0						
w/bonus	100,000		100,000						
end of 1	65	109,000	(6,000)	109,000	(6,000)	100,000	3,000	(12,752)-13%	84,248
end of 2	66	118,390	(6,120)	118,390	(6,120)	102,000	3,060	(13,014)-13%	85,926
end of 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)-13%	87,636
end of 4	68	132,029	0	132,029	0	0	0	0-0%	0
end of 5	69	135,990	0	135,990	0	0	0	0-0%	0
end of 6	70	140,070	0	140,070	0	0	0	0-0%	0
end of 7	71	144,272	0	144,272	0	0	0	0-0%	0
end of 8	72	148,600	0	148,600	0	0	0	0-0%	0
end of 9	73	153,058	0	153,058	0	0	0	0-0%	0
end of 10	74	157,650	0	157,650	0	0	0	0-0%	0
end of 11	75	162,379	0	162,379	0	0	0	0-0%	0
end of 12	76	167,251	0	167,251	0	0	0	0-0%	0
end of 13	77	172,268	0	172,268	0	0	0	0-0%	0
end of 14	78	177,436	0	177,436	0	0	0	0-0%	0
end of 15	79	182,759	0	182,759	0	0	0	0-0%	0
end of 16	80	188,242	0	188,242	0	0	0	0-0%	0
		(18,362)		(18,362)		306,040	9,181	(39,049)	257,810

Orange backgrounds indicate hypothetical returns

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.

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: Adding an Employer Match 401k

Planning Horizon: 16 years

Accounts: 401k

Incomes:

Year	Account	Income	Accounts Total	Planned Distribution	Wages	Employer Match	Approx. Income Tax	After Tax Income	Year
net return	64	3.00 %							
initial amount	100,000		100,000						
bonus %	0.00 %		0						
w/bonus	100,000		100,000						
end of 1	65	109,000	(6,000)	109,000	(6,000)	100,000	3,000	(12,752)-13%	84,248
end of 2	66	118,390	(6,120)	118,390	(6,120)	102,000	3,060	(13,014)-13%	85,926
end of 3	67	128,184	(6,242)	128,184	(6,242)	104,040	3,121	(13,283)-13%	87,636
end of 4	68	132,029	0	132,029	0	0	0	0-0%	0
end of 5	69	135,990	0	135,990	0	0	0	0-0%	0
end of 6	70	140,070	0	140,070	0	0	0	0-0%	0
end of 7	71	144,272	0	144,272	0	0	0	0-0%	0
end of 8	72	148,600	0	148,600	0	0	0	0-0%	0
end of 9	73	153,058	0	153,058	0	0	0	0-0%	0
end of 10	74	157,650	0	157,650	0	0	0	0-0%	0
end of 11	75	162,379	0	162,379	0	0	0	0-0%	0
end of 12	76	167,251	0	167,251	0	0	0	0-0%	0
end of 13	77	172,268	0	172,268	0	0	0	0-0%	0
end of 14	78	177,436	0	177,436	0	0	0	0-0%	0
end of 15	79	182,759	0	182,759	0	0	0	0-0%	0
end of 16	80	188,242	0	188,242	0	0	0	0-0%	0
		(18,362)		(18,362)		306,040	9,181	(39,049)	257,810

Orange backgrounds indicate hypothetical returns

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