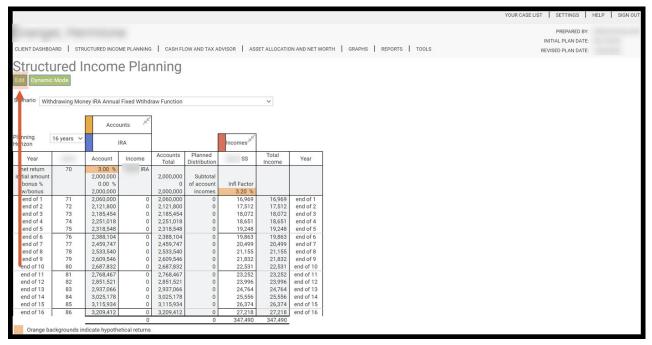
Withdrawing from an IRA Account Using the Annual Withdrawal Function

11/08/2024 1:15 pm EST

From the structured income planning page there are different ways you can withdraw money from an IRA account. Below is a step-by-step guideline for withdrawing money using the annual withdrawal function.

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



Step 2: Manage: Click on the green manage button within the column for the IRA account.

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Option A: Pick Years:

Step 3: Structured Income Type: Click on the radio button next to Annual Fixed Withdrawal.

				Y	OUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Accour	ht.						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Inco	me Data	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Yea	Income	Variable	-
Hypothetical return	3.0 %	 Start payout from income rider 	Distance	2			
			Pick year(s) OR	3			
Bonus	0.0 %	Liquidate or annuitize		4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan	6			
Account description Optional account company		 Liquidate account (in so many years) 	OR	7			
Other			Start year for X years				
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
	Tax Income Distributions (Qualified)	Annual fixed withdrawal	Pick year(s) to remove	11			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12			
		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 not himb (based on beneficialies ine)		16 17			
Account owner	~		Reset all years	18			
Assessment from a		Calculated Plan Withdrawals		19 20			
Account type Add an income rider	IRA ~	O Make-up total owners RMD from one account		21			
27 of 19568	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			-
Number of months of payout in first y	ear 12.0			4			+
Enter manual payout		Annual Savings					
		Annual fixed savings					
	ncome Rider						
Orange backgrounds indicate hy	pothetical returns		Note that enter	red values	WILL NOT roll dov	vn to following years w	/hen blank

Step 4: Annual Fixed Withdrawal Text Box: Enter in the monetary amount as a number. SIPS does not recognize the dollar sign; it only accepts number with or without commas. For example: 5,000;5000;-5,000; or -5000.

				YOU	R CASE LIST SETTING	SS HELP	SIGN OUT
Manage Account							
Save Cancel View / Edit Income View / Edit De	ath Benefit View / Edit Actual Values						
Account name IRA		Structured Income Type			Income Data		
Initial account balance \$2,000,00	0	Income Riders	ADD INCOME	Year	Income	Variable	
TS SERVICE TO SERVICE		 Start payout from income rider 					
Hypothetical return 3.	0 %		Pick year(s)	3			
Bonus 0.	0 %	Liquidate or annuitize	OR	4			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description		 Liquidate account (in so many years) 	OR				
Optional account company				8			
Other			Start year for X years	9			
Tax calculation option Tax Income	Distributions (Qualified)	Withdrawals	0	10			
Add money later - deferred account		 Annual fixed withdrawal 	Pick year(s) to remove	12			
Years deferred 0		Annual percentage withdrawal 0.0 %	6 () (SDP	13			
Asset plan allocation Moderate	_	O 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				17			
Account owner	~		Reset all years	18			
		Calculated Plan Withdrawals		19 20			
Account type IRA Add an income rider	~	 Make-up total owners RMD from one account 		20			
Based on age Client2 's age	O Joint	 Make-up total benef RMD from one account 		22			
Select income rider	V	O Make-up income gap based on target income		23			-
Number of months of payout in first year	12.0			₹ 24			>
Enter manual payout	t da - M						
		Annual Savings					
Request Additional Rider Remove Income Rider		0					
Orange backgrounds indicate hypothetical return	rns		Note that ente	red values WI	LL NOT roll down to follo	wing years wh	nen blank

Step 5: Income Data: Within the Income data table click on the Year text box that you would like to select.

					YOU	JR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accoun)t							
	View / Edit Death Benefit View / Edit Actual Values							
				1				
Account name	IRA	Structured Income Type		ł		Income D	lata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	ŕ	Year	Income	Variable	*
		 Start payout from income rider 	-		1			
Hypothetical return	3.0 %		Pick year(s)		2			
Bonus	0.0 %	18 m 18	OR		4			
Ontional		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	Ö	5			
Optional Account description			OR		6			
Optional account company		 Liquidate account (in so many years) 			7			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10			
	Tax income Distributions (Qualified)	Annual fixed withdrawal 60,000			11			
Add money later - deferred account		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12 13			
Years deferred	0				14			
Asset plan allocation	Moderate Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15			
Risk level		 Beneficial IRA RMD (based on beneficiaries life) 		Ö	16			
RISKIEVEI	Moderate		an and a state of the		17			
Account owner	~	Calculated Plan Withdrawals	Reset all years		18 19			
Account type	IRA V	 Make-up total owners RMD from one account 			20			
Add an income rider					21			
Based on 🔘 age 🔿 C	Client2 's age 🔘 Joint				22			
Select income rider	~	 Make-up income gap based on target income 			23 24			-
Number of months of payout in first ye	ar 12.0			4				•
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	come Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red va	lues W	ILL NOT roll down to	following years	when blank

Step 6: Pick Years: Click on the green button Pick Years.

					YOUR C/	ASE LIST SET	TINGS HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	3.0 %		Pick year(s)		2			
Bonus	0.0 %	-	OR		3			
Optional		Liquidate or annuitize O 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) 			7			
Other			Start year for X years		9			
			0		10			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal 60,000			11			
Add money later - deferred account		-	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 IKA RMD (based on beneficialies life)			16 17			
			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals	(toottan) onlo		19			
Account type	IRA ~	O 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 🔘 Joint				22			
Select income rider	~	 Make-up income gap based on target income 			23 24			-
Number of months of payout in first ye	ear 12.0							- F
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 va	lues WILL N	NOT roll down to t	ollowing years w	hen blank

Step 7: Clicking: After clicking on the Pick Years green button, the term "fixed" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

					YOUR C/	ASE LIST SETT	TINGS HELP	SIGN OUT
Manage Accoun	1 [†]						1	
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Other strengtheness Trans				Income Da	ata	
Initial account balance		Structured Income Type	ADD INCOME		Year	Income	Variable	
	\$2,000,000	 Start payout from income rider 			1	fixed	60,000	
Hypothetical return	3.0 %		Pick year(s)		2	fixed	60,000 60,000	
Bonus	0.0 %		OR		4	fixed	60,000	
Orthout		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	ŏ	5	fixed	60,000	
Optional Account description			OR		6	fixed	60,000	
Optional account company		 Liquidate account (in so many years) 			7	fixed fixed	60,000 60,000	
Other			Start year for X years		9	fixed	60,000	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	0	10	fixed	60,000	
		Annual fixed withdrawal	Pick year(s) to remove		11			
Add money later - deferred account Years deferred		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12			
reals defened	0				14			
Asset plan allocation	Moderate Sel		Remove year to end of plan		15			
Risk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 			16 17			
			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals	Neset un yeurs		19			
Account type	IRA 🗸	O Make-up total owners RMD from one account			20			
Add an income rider		Make-up total benef RMD from one account			21 22			
Based on 🔘 age 🔾 C	Client2 's age 🔘 Joint	 Make-up income gap based on target income 			22			
Select income rider	~	Make-up income gap based on target income		2	24			-
Number of months of payout in first ye	12.0			<u>_q</u>				,
Enter manual payout		Annual Savings						
		Annual fixed savings						
	come Rider							
Orange backgrounds indicate hyp	oothetical returns		Note that enter	red va	ues WILL N	NOT roll down to f	ollowing years w	hen blank

Step 8: Save: Click on the green button Save underneath the Manage Account subheading.

					YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Account							
	/ Edit Death Benefit View / Edit Actual Values						
Account name IRA		Structured Income Type			Inco	ome Data	
Ini al account balance \$2	2,000,000	Income Riders	ADD INCOME		'ear Income 1 fixed	Variable 60,000	*
Hypothetical return	3.0 %	 Start payout from income rider 	Pick year(s)		2 fixed	60,000	
			OR		3 fixed	60,000	
Bohus	0.0 %	Liquidate or annuitize			4 fixed 5 fixed	60,000 60,000	
Op ional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		6 fixed	60,000	
Account description		 Liquidate account (in so many years) 	OR		7 fixed	60,000	
Optional account company				ŏ	8 fixed	60,000	
Dther			Start year for X years		9 fixed	60,000	
Ta calculation option Tax I	Income Distributions (Qualified)	Withdrawals	0	0	10 fixed	60,000	
Act money later - deferred account		 Annual fixed withdrawal 	Pick year(s) to remove	U .	12		
Acd money later - deferred account		Annual percentage withdrawal 0.0 %			13		
	5	Required minimum distribution (RMD)		Ö	14		
Asset plan allocation Mode	erate Sel		Remove year to end of plan	Ō	15		
Risk level Mode	erate	 Beneficial IRA RMD (based on beneficiaries life) 		<u> </u>	16		
Wode	erate		Develop		17 18		
Account owner	~	Calculated Plan Withdrawals	Reset all years		19		
Account type	~	Make-up total owners RMD from one account			20		
Add an income rider				ŏ	21		
Based on 💿 age 🔿 Client2		 Make-up total benef RMD from one account 			22		
Select income rider	~	O Make-up income gap based on target income		0	23		-
Number of months of payout in first year	12.0			-	74		
Enter manual payout							
		Annual Savings					
Request Additional Rider Remove Income	Rider						
Orange backgrounds indicate hypothetic	ical returns		Note that enter	ed valu	es WILL NOT roll dov	vn to following years	when blank

Step 9: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

																		YOUR CA	SE LIST	SETT	INGS	HELP	SIG	N C
																				PREF	PARED BY:			
																			IN	ITIAL PL	AN DATE:			
CLIENT DASHBO	DARD STR	UCTURED INCO	E PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	SET ALLOCATIO	ON AND NET W	T WOR	RTH	(T	GRA	PHS	REPO	ORTS	TOOLS					AN DATE:			
Struct	ured I	ncom	Plar	nnina																				
					Add Target	Edit or Add Scen	ario Displa	y Options	1															
Care ouve e					Nuo rarger		lano Dispic	y options																
Scenario Wit	hdrawing Mon	ey IRA Annua	Fixed Wtihdr	raw Function			~																	
			•																					
		Acco	ounts 🔊																					
Planning Horizon	16 years 🗸		IRA			Incomes																		
				Accounts	Planned		Total																	
Year		Account	Income	Total	Distribution	SS	Income	Year																
net return	70	3.00 %	IRA																					
initial amount		2,000,000		2,000,000	Subtotal	Manage																		
bonus %		0.00 %		0	of account	Infl Factor																		
w/bonus	7.	2,000,000	Manage	2,000,000	incomes	3.20 %	76,969	end of 1	_															
end of 1 end of 2	71 72	2,000,000 2,000,000	60,000 60,000	2,000,000	60,000 60,000	16,969 17,512	76,969	end of 1 end of 2																
end of 3	73	2,000,000	60,000	2,000,000	60,000	18,072	78,072	end of 3																
end of 4	74	2,000,000	60,000	2,000,000	60,000	18,651	78,651	end of 4																
end of 5	75	2,000,000	60,000	2,000,000	60,000	19,248	79,248	end of 5																
end of 6	76	2,000,000	60,000	2,000,000	60,000	19,863	79,863	end of 6																
end of 7	77	2,000,000	60,000	2,000,000	60,000	20,499	80,499	end of 7																
end of 8	78	2,000,000	60,000	2,000,000	60,000	21,155	81,155	end of 8																
end of 9	79	2,000,000	60,000	2,000,000	60,000	21,832	81,832	end of 9																
end of 10	80	2,000,000	60,000	2,000,000	60,000	22,531	82,531	end of 10																
end of 11	81	2,060,000	0	2,060,000	0	23,252	23,252	end of 11	1															
end of 12	82	2,121,800	0	2,121,800	0	23,996	23,996	end of 12	2															
end of 13	83	2,185,454	0	2,185,454	0	24,764	24,764	end of 13	3															
end of 14	84	2,251,018	0	2,251,018	0	25,556	25,556	end of 14																
end of 15	85	2,318,548	0	2,318,548	0	26,374	26,374	end of 15																
end of 16	86	2,388,104	0	2,388,104	0	27,218	27,218	end of 16	6															
			600,000		600,000	347,490	947,490																	
Orange ba	ackgrounds in	dicate hypoth	etical returns																					
	-																							r

Option B: Start Years for Rest of Plan: Step 10: Structured Income Type: Click on the radio button next to Annual Fixed Withdrawal.

					YOUR CASI	ELIST SETTING	S HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income Data		
Initial account balance	\$2,000,000	Income Riders	ADD INCOME		Year 1	Income	Variable	
Hypothetical return	3.0 %	 Start payout from income rider 	Pick year(s)		2			
			OR		3			
Bonus	0.0 %	Liquidate or annuitize			4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan OR		6			
Account description Optional account company		O Liquidate account (in so many years)	UK		7			
Other			Start year for X years		8			
Tax calculation option	Turkey Disking (Our life a)	Withdrawals	0		10			
	Tax Income Distributions (Qualified)	Annual fixed withdrawal			11			
Add money later - deferred account		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12			
Years deferred	0				14			
Asset plan allocation	Moderate Sel	Required minimum distribution (RMD)	Remove year to end of plan		15			
Risk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 			16			
			Reset all years		17			
Account owner	~	Calculated Plan Withdrawals	Neoci un yeuro		19			
Account type	IRA ~	O Make-up total owners RMD from one account			20			
Add an income rider		Make-up total benef RMD from one account			21 22			
Based on 💿 age 🔾 (Client2 's age O Joint	Make-up income gap based on target income			23			
Select income rider	~	O make up income gap based on taiget income		ŝ	24			· •
Number of months of payout in first ye	ear 12.0			4				,
Enter manual payout		Annual Savings						
Request Additional Rider Remove Ir	ncome Rider	Annual fixed savings						
				7.17		-		
Orange backgrounds indicate hyperic of the second s	potnetical returns		Note that ente	red valu	ues WILL NO	T roll down to follo	wing years wh	ien blank

Step 11: Annual Fixed Withdrawal Text Box: Enter in the monetary amount as a number. SIPS does not recognize the dollar sign; it only accepts number with or without commas. For example: 5,000;5000;-5,000; or -5000.

				YOU	JR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accour	t.						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income D	ata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Year	Income	Variable	*
Hypothetical return		 Start payout from income rider 					
Hypothetical return	3.0 %		Pick year(s)	3			
Bonus	0.0 %	Liquidate or annuitize	on a	4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description		O Liquidate account (in so many years)	OR	0 7			
Optional account company Other			Start year for X years	8			
				9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal		11		_	
Add money later - deferred account			Pick year(s) to remove	12		-	
Years deferred	0	Annual percentage withdrawal 0.0 %		13			
Asset plan allocation	Moderate Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	15			
Risk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 		16			
	Moderate		Reset all years	17			
Account owner	`	Calculated Plan Withdrawals	Reset all years	19			
Account type	IRA 🗸	O Make-up total owners RMD from one account		20			
Add an income rider		Make-up total benef RMD from one account		21			
and the second se	Client2 's age O Joint	 Make-up income gap based on target income 		23			
Select income rider	~	0		~ 24			*
Number of months of payout in first ye Enter manual payout	ear 12.0						
		Annual Savings					
Request Additional Rider Remove In	ncome Rider	Annual fixed savings					
Orange backgrounds indicate hyp			Note that ente	red values W	ILL NOT roll down to	ollowing years w	hen blank

Step 12: Income Data: Within the Income data table click on the Year text box that you would like to start the year for the rest of the plan.

					YOU	IR CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour	at								
	View / Edit Death Benefit View / Edit Actual Values								
ource ouncer view / Ear meane	Them / Luit Death Deficite Them / Luit Actual Values			1					
Account name	IRA	Structured Income Type		ŧ		Inco	ome Data		~
Initial account balance	\$2,000,000	Income Riders Start payout from income rider	ADD INCOME		Year 1	Income		Variable	*
Hypothetical return	3.0 %		Pick year(s)		2				
Bonus	0.0 %	Liquidate or annuitize	OR	0	4				
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		5 6				
Account description Optional account company Other		O Liquidate account (in so many years)	OR Start year for X years	0000	7 8 9				
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal 75,000	0		10 11				
Add money later - deferred account		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12 13				
Years deferred	0	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 beneficianes life)			16 17				
Account owner	~		Reset all years	Ö	18				
Account type	IRA Y	Calculated Plan Withdrawals Make-up total owners RMD from one account			19 20				
Add an income rider	IDA V			0	21				
Based on 💿 age 🔾	Client2 's age 🔘 Joint	Make-up total benef RMD from one account			22 23				
Select income rider	~	O Make-up income gap based on target income		0	24				*
Number of months of payout in first ye	ear 12.0			- 4					P
Enter manual payout		Annual Savings							
Request Additional Rider Remove In	ncome Rider	Annual fixed savings							
Orange backgrounds indicate hy	pothetical returns		Note that enter	red va	alues WI	LL NOT roll dov	vn to followi	ing years wh	en blank

Step 13: Start Years for Rest of Plan: Click on the green button Start Years for Rest of Plan.

					YOUR	CASE LIST SETT	TINGS HELP	SIGN OUT
Manage Accour	1 [†]							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	3.0 %		Pick year(s)		2			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional			Start year for rest of plan		5			
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			
	Tax moome Distributions (Qualified)	Annual fixed withdrawal 75,000			11			
Add money later - deferred account		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12			
Years deferred	0				13 14			
Asset plan allocation	Moderate Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15			
		 Beneficial IRA RMD (based on beneficiaries life) 	nemore year to end or plan		16			
Risk level	Moderate				17			
Account owner	~		Reset all years		18			
A		Calculated Plan Withdrawals			19 20			
Account type Add an income rider	IRA V	O Make-up total owners RMD from one account			21			
		 Make-up total benef RMD from one account 			22			
	Client2 's age O Joint	O Make-up income gap based on target income			23			
Select income rider	~	0		7	24			*
Number of months of payout in first ye	ear 12.0			1				
Enter manual payout		Annual Savings						
		O Annual fixed savings						
Request Additional Rider Remove In	icome Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to f	ollowing years v	vhen blank

Step 14: Clicking: After clicking on the Pick Years green button, the term "fixed" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

					YOUR CASE L	LIST SETTINGS	HELP	SIGN OUT
Manage Accour	nt.					1		
	View / Edit Death Benefit View / Edit Actual Values							
Save Cancer View / Eult income	view / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income Data		
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME				ariable 75,000	-
Hypothetical return	3.0 %		Pick year(s)				75,000 75,000	
Bonus	0.0 %	Liquidate or annuitize	OR	0			75,000	
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan				75,000 75,000	
Account description		 Liquidate account (in so many years) 	OR				75,000	
Optional account company		O Elquidate account (in so many years)					75,000	
Other			Start year for X years	ä	9 f	fixed 7	75,000	
Tay coloulation option	Television Distribution (Constraint)	Withdrawals	0		10 f	fixed 7	75,000	
Tax calculation option	Tax Income Distributions (Qualified)	Annual fixed withdrawal		ň	11 f	fixed 7	75,000	
Add money later - deferred account			Pick year(s) to remove	õ	12 f	fixed 7	75,000	
Years deferred	0	Annual percentage withdrawal 0.0 %			13 f	fixed 7	75,000	
		 Required minimum distribution (RMD) 			14 f	fixed 7	75,000	
Asset plan allocation	Moderate Sel		Remove year to end of plan		15 f	fixed 7	75,000	
Diale lavel		 Beneficial IRA RMD (based on beneficiaries life) 			16 f	fixed 7	75,000	
Risk level	Moderate		-		17 f	fixed 7	75,000	
Account owner	~		Reset all years		18 f	fixed 7	75,000	
		Calculated Plan Withdrawals			19 f	fixed 7	75,000	
Account type	IRA 🗸	 Make-up total owners RMD from one account 					75,000	
Add an income rider		 Make-up total benef RMD from one account 					75,000	
Based on 💿 age 🔾	Client2 's age O Joint	Make-up total benef RMD from one account			22 f		75,000	
Select income rider		 Make-up income gap based on target income 					75,000	-
	~			-	24 f	fixed 7	75.000	
Number of months of payout in first y	lear 12.0							
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove I	ncome Rider							
Orange backgrounds indicate hy	pothetical returns		Note that enter	ed val	ues WILL NOT	roll down to following	g years wh	en blank

Step 15: Save: Click on the green button Save underneath the Manage Account subheading.

					YOUR	CASE LIST SET	TINGS HELP	SIGN 0
Manage Accour	1							
	View / Edit Death Benefit View / Edit Actual Values							
Save Cancel View / Edit Income	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income E	Data	
In ial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income fixed	Variable 75,000	-
Hypothetical return	3.0 %	0	Pick year(s)		2	fixed	75,000 75,000	
Bonus	0.0 %	Liquidate or annuitize	OR		4	fixed	75,000	
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		5	fixed	75,000 75,000	
Account description		 Liquidate account (in so many years) 	OR	10	7	fixed	75,000	
Optional account company		O Equidate decount (in so many years)			8	fixed	75,000	
Other			Start year for X years		9	fixed	75,000	
Tat calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10	fixed	75,000	
rat calculation option	Tax Income Distributions (Qualified)	Annual fixed withdrawal			11	fixed	75,000	
Acd money later - deferred account			Pick year(s) to remove		12	fixed	75,000	
Years deferred	0	Annual percentage withdrawal 0.0 %			13	fixed	75,000	
		 Required minimum distribution (RMD) 			14	fixed	75,000	
Asset plan allocation	Moderate Sel	 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end of plan		15	fixed	75,000	
Ri k level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 			16 17	fixed	75,000	
			Reset all years		18	fixed	75,000 75,000	
Account owner	~		Reset all years		19	fixed	75,000	
Account type	IRA Y	Calculated Plan Withdrawals			20	fixed	75,000	
Add an income rider	IRA V	 Make-up total owners RMD from one account 			21	fixed	75,000	
	Client2 's age O Joint	 Make-up total benef RMD from one account 			22	fixed	75,000	
	Client2 's age O Joint	O Make-up income gap based on target income			23	fixed	75,000	
Select income rider	~	· · · · · · · · · · · · · · · · · · ·		9	24	fixed	75 000	-
Number of months of payout in first ye	ear 12.0			4				P
Enter manual payout 📄		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	ncome Rider	<u> </u>						
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to	following years w	hen blank

Step 16: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

0										YOUR CASE LIST SETTINGS HELP SIG
		-								PREPARED BY:
		_								INITIAL PLAN DATE:
CLIENT DASHBO	ARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	ET ALLOCATIO	ON AND NET W	RTH GRAPHS REPORTS TOOLS	REVISED PLAN DATE:
Structu	ured I	ncom	e Plar	nning						
					dd Target	dit or Add Scer	ario Displa	v Ontions		
Eun Save C	Add	ACCOUNT AC	A meetine A		tuu Target	un of Add Scen	Displa	y options		
			-							
Scenario With	ndrawing Mon	ey IRA Annua	Fixed Wtihdr	aw Function			~			
		· · ·								
		Acco	unts 🔎							
lanning			21020							
Planning Horizon	16 years ∨		IRA			Incomes				
	-			Accounts	Planned		Total			
Year		Account	Income	Total	Distribution	SS	Income	Year		
net return	70	3.00 %	IRA							
initial amount		2,000,000		2,000,000	Subtotal	Manage				
bonus % w/bonus		0.00 % 2,000,000	Manager	0 2,000,000	of account incomes	Infl Factor 3.20 %				
end of 1	71	1,985,000	Manage 75,000	1,985,000	75,000	16,969	91,969	end of 1		
end of 2	72	1,969,550	75,000	1,969,550	75,000	17,512	92,512	end of 2		
end of 2	73	1,953,636	75,000	1,953,636	75,000	18,072	93.072	end of 3		
end of 4	74	1,937,246	75,000	1,933,030	75,000	18,651	93,672	end of 4		
end of 5	75	1,920,363	75,000	1,920,363	75,000	19,248	94,248	end of 5		
end of 6	76	1,902,974	75,000	1,920,303	75,000	19,240	94,240	end of 6		
end of 7	77	1,885.063	75,000	1,885,063	75,000	20,499	95,499	end of 7		
end of 8	78	1,866,615	75,000	1,866,615	75,000	21,155	96,155	end of 8		
end of 9	79	1,847,613	75,000	1,847,613	75,000	21,832	96,832	end of 9		
end of 10	80	1,828,041	75,000	1,828,041	75,000	22,531	97,531	end of 10		
end of 11	81	1,807,883	75,000	1,807,883	75,000	23,252	98,252	end of 11		
end of 12	82	1,787,119	75,000	1,787,119	75,000	23,996	98,996	end of 12		
end of 13	83	1,765,732	75,000	1,765,732	75,000	24,764	99,764	end of 13		
end of 14	84	1,743,704	75,000	1,743,704	75,000	25,556	100,556	end of 14		
end of 15	85	1,721,016	75,000	1,721,016	75,000	26,374	101,374	end of 15		
end of 16	86	1,697,646	75,000	1,697,646	75,000	27,218	102,218	end of 16		
ond of TO		1,017,040	1.200.000	1,077,040	1.200.000	347,490	1.547.490	0.10 01 10		
					1,200,000	047,490	1,047,490			
Orange ba	ckgrounds in	dicate hypoth	etical returns							

Option C: Start Year for X Years:

Step 17: Structured Income Type: Click on the radio button next to Annual Fixed Withdrawal.

Initial account balance \$2,000,000 Income Ride	t payout from income rider t payout from income rider Pick year(s) OR 4
Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values Account name IRA Structure Initial account balance \$2,000,000 Start pa	ADD INCOME Year Income Variable t payout from income rider Pick year(s) OR 4
Initial account balance \$2,000,000 Start p	ADD INCOME Year Income Variable t payout from income rider Pick year(s) OR 4
Initial account balance \$2,000,000 Start p	ADD INCOME Year Income Variable t payout from income rider Pick year(s) OR 4
Start pi	t payout from income rider t payout from income rider Pick year(s) OR 4
	Pick year(s) 2 OR 4
	OR 3 4
Bonus 0.0 %	o o o populitizo
Liquidate or	5
	uitize (for years certain) 1.0 % Start year for rest of plan 6
Account description Otional account company	idate account (in so many years) 7
Other	Start year for X years
Guier	
Tax calculation option Tax Income Distributions (Qualified)	vals
	ual fixed withdrawal Pick year(s) to remove
Add money later - deferred account	ual percentage withdrawal 0.0 %
Asset plan allocation Moderate Sel	uired minimum distribution (RMD) Remove year to end of plan
	eficial IRA RMD (based on beneficiaries life) 16
Risk level Moderate	17
Account owner	Reset all years 18
Calculated F	ed Plan Withdrawals
	te-up total owners RMD from one account
Add an income rider Make-u	te-up total benef RMD from one account
Based on 💿 age 🔿 Client2 's age 🔿 Joint	
Select income rider	te-up income gap based on target income
Number of months of payout in first year 12.0	4
Enter manual payout Annual Savi	avinne
	avings ual fixed savings
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	Note that entered values WILL NOT roll down to following years when blank

Step 18: Annual Fixed Withdrawal Text Box: Enter in the monetary amount as a number. SIPS does not recognize the dollar sign; it only accepts number with or without commas. For example: 5,000;5000;-5,000; or -5000.

				Y	YOUR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income [lata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Year		Variable	
mitul decourt bulance	\$2,000,000	 Start payout from income rider 		1			
Hypothetical return	3.0 %		Pick year(s)	2			
Bonus	0.0 %		OR	4			
Optional		Liquidate or annuitize O 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) 					
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
		Annual fixed withdrawal	Pick year(s) to remove	11		_	
Add money later - deferred account Years deferred		Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12			
rears deterred	0	Required minimum distribution (RMD)		14			
Asset plan allocation	Moderate Sel		Remove year to end of plan	15			
Risk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 		16			
			Reset all years	18			
Account owner	`	Calculated Plan Withdrawals		19			
Account type	IRA 🗸	O 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	O Make-up income gap based on target income		23			
Select income rider	~	O make up moome gap based on target moome		24			
Number of months of payout in first ye	ear 12.0						
Enter manual payout		Annual Savings					
Request Additional Rider Remove Ir	ncome Rider	Annual fixed savings					
Orange backgrounds indicate hy			Note that enter	red values	WILL NOT roll down to	following years w	hen blank

Step 19: Income Data: Within the Income data table click on the Year text box that you would like to select.

Structured income Type income Rides pothetical return 30 % 00 % Liquidate or annuitze 00 % Liquidate or annuitze 00 % Diptional account company Other Calculated on points 1 ax income Distributions (Qualified) ~ Withdrawals 0 Annual freed withdrawal 0 Annual freed withdrawal 0 Annual precentage withdrawal 0 Maderate cocuunt owner x calculation option dat necome Type mark deferred 0 Maderate cocuunt owner x calculated Plan Withdrawals 0 Maderate 0 Mader						YOU	JR CASE LIST SETTIN	IGS HELP	SIGN OU
Ret Ret Ret Submet All Ret All Ret All All All All All All All All All Al	Manage Accour	ht.							
coount name IRA tail account balance 5200000 pothetical return 30 % nus 00 % coount description 00 % Optional account description 10 % Optional account descript									
structure Structure Type income Bides pothetical return 30 % Pick year(s) 3 mus 00 % Istart payout from income rider Pick year(s) 3 shoal 00 % Liquidae or annuitze 00 % 3 Account description 00 % Liquidae account (ins om any years) 00 % 3 other 10 % Start year for rest of plan 6 other 00 % 00 % 00 % 00 % diquidate account (ins om any years) 00 % 00 % 00 % other 00 % 00 % 00 % 00 % diquidate account (ins om any years) 00 % 00 % 00 % 00 % start payout from income fider 00 % 00 % 00 % 00 % 00 % start payout ford viethdrawal 00 % <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>									
tial account balance \$2000000 pothetical return 30 % mus 00 % Uquidate or annuitize 0 Required form income rider Pick year(s) 3 Account description 0 % Optional account company 0 % Other 0 % Account description 0 % Optional account company 0 % Other 0 % Account description 0 % Optional account (in so many years) 0 % Account description 0 % Optional account (in so many years) 0 % Account description 0 % Optional account 0 % Account description 0 % Optional account (in so many years) 0 % Account description 0 % Account description 0 % Optional account 0 % Account description 0 % Optional account 0 % Account description 0 % Optional account 0 % Account description 0 % Account description 0 % Account description 0 % Account description 10 % Account description 0 % <tr< td=""><td>Account name</td><td>IRA</td><td>Structured Income Type</td><td></td><td>¥</td><td></td><td>Income Data</td><td>3</td><td></td></tr<>	Account name	IRA	Structured Income Type		¥		Income Data	3	
start payout from income rider OR	Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Ċ.		Income	Variable	*
muss 00% Account description Annuitize (for years certain) Optional account company 1.0% Optional account company Cludidate account (in so many years) Other Start year for X years oth money later - defered account 0 oth annual fixed withdrawals 0.00% ex calculation option Tax Income Distributions (Qualified) Withdrawals 0.00% ex calculation option Tax Income Distributions (Qualified) Withdrawals 0.00% ext defered account 0 o Annual fixed withdrawal asd defered 0.00% ext later - defered account 0.00% o Required minimum distribution (RMD) beneficial IRA RMD (based on beneficiaries life) occunt towner 12 isk level Maderate asd on @ age imber offer 0 asd on @ age inter manual payout Make-up total owners RMD from one account inter manual payout 0	Hupothatical ratura		 Start payout from income rider 						
Inclus 0.0 % Iter description Optional account description Optional account company Other Iter deferred account 0 ars deferred 0 0 Moderate Start year for rest of plan 0 Iter deferred account 0 0 Vithdrawals 0 0 0 0 Vithdrawals 0 0 0 0 0 Vithdrawals 0 0 0 0 0 0 0 0 Vithdrawals 0	Hypothetical return	3.0 70			ŏ	3			
Account description Optional account company Other Account in trax income Distributions (Qualified) Withdrawals I dononey later - deferred account I aras deferred I dononey later - deferred account I aras deferred	Bonus	0.0 %	Liquidate or annuitize	U.S.		4			
Answer Other Other Annual fixed withdrawals Image: Client2's age Joint Beter income rider ased on @ ased on @ Age: Client2's age Joint Beter income rider ased on @ Age: Client2's age Joint Beter income rider ased on @ Aset planal payout Make-up total benef RMD from one account Image: Client2's age Joint Beter income rider ased on @ Age: Client2's age Joint Beter income rider Asset planal payout Annual fixed savings	Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Other Start year for X years o Tax Income Distributions (Qualified) wthdfawals Image: Income Distributions (Qualified) Image: Income			O Liquidate account (in so many years)	OR		7			
xx calculation option Tax Income Distributions (Qualified) withdrawals id money later - deferred account iars deferred iars deferred iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii				Start year for Y years					
x calculation option Tax Income Distributions (Qualified) withdrawais id money later - deferred account iars deferred iars deferred iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii									
dd money later - deferred account aars deferred aars defe	Tax calculation option	Tax Income Distributions (Qualified)							
and occurds asset plan allocation Moderate sk level Moderate count owner Count owner Count owner Count owner Count owner Count owner Calculated Plan Withdrawals Calculated Plan Withdrawals Make-up total benef RMD from one account ased on @ age Client2's age Joint elect income rider umber of months of payout in first year ter manual payout Annual Savings Annual fixed savings	Add money later - deferred account		00,000	Pick year(s) to remove					
sester plan allocation Moderate sk level Moderate beneficial IRA RMD (based on beneficiaries life) count owner count owner count type RRA age Client2's age Joint elect income rider umber of months of payout in first year 12.0 Annual Savings Annual fixed savings	Years deferred	0							
sk level Moderate bcount owner IT bcount owner Reset all years bcount owner IRA count type IRA id an income rider Make-up total owners RMD from one account ased on @ age client2's age Joint elect income rider It umber of months of payout in first year 12.0 ter manual payout Annual Savings Annual Savings	Asset plan allocation	Moderate Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	ä				
Image: Column of the second of th	Risk level	Madanta	 Beneficial IRA RMD (based on beneficiaries life) 		Ö				
Calculated Plan Withdrawals 0 bit percent of the result of the	Nor level	Moderate		Desetall					
count type IRA d a nicome rider ased on (a) age client2's age Joint Make-up total owners RMD from one account 20 21 Make-up total benef RMD from one account 22 Make-up total benef RMD from one account 23 where up income gap based on target income 23 action on the remained payout Annual Savings	Account owner	~	Calculated Plan Withdrawals	Reset all years					
Additional Rider Remove Income Rider Annual Savings Annual fixed	Account type	IRA 🗸				20			
ased on age Client2 sage Joint Make-up income gap based on target income elect income rider 120 Annual Savings Annual fixed savings Annual fixed savings	Add an income rider		 Make-up total benef RMD from one account 						
elect noome inder		Client2 's age O Joint	Make-up income gap based on target income						
Annual Savings Annual fixed savings Annual fixed savings Annual fixed savings	Select income rider				-00	24			*
Annual Savings		ear 12.0							
Request Additional Rider Remove Income Rider	Enter manual payout								
	Request Additional Rider Remove Ir	ncome Rider	Annual fixed savings						
		A de la desensa de la desen		Note that ente	red va	alues W	ILL NOT roll down to fol	owing years y	when blank

Step 20: Start Year for X Years Text Box: Within the text box for Start Year fox X Years, type in how many years you would like the monetary amount to be distributed.

				YOUR C	ASE LIST SETTING	S HELP	SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income Data		
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME	Year 1	Income	Variable	^
Hypothetical return	3.0 %		Pick year(s)	2			
Bonus Optional Account description Optional account company Other	0.0 %	Liquidate or annuitize Annuitize (for years certain) Liquidate account (in so many years)	OR Start year for rest of plan OR Start year for X years	4 5 6 7 8			
Tax calculation option Add money later - deferred account Years deferred Asset plan allocation	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal 0.0 Annual percentage withdrawal 0.0 Required minimum distribution (RMD) Beneficial IRA RMD (based on beneficiaries life) 	Pick year(a) to remove	9 10 11 12 13 14 15 16			ł
Risk level Account owner Account type Add an income rider	IRA V	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account	Reset all years	17 18 19 20 21			
Based on age General age Based on Based on	Client2 's age O Joint	Make-up income gap based on target income		22 23 4			+
Enter manual payout	icome Rider	Annual Savings Annual fixed savings	Note that enter	ed values WILL	NOT roll down to follo	wing years wh	nen blank

Step 21: Start Year of X Years: Click on the green button Start Year for X Years.

					YOUR CA	SE LIST SET	TINGS HELP	SIGN
Manage Accoun)†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME		Year	Income	Variable	
		 Start payout from income rider 	v		1			
Hypothetical return	3.0 %		Pick year(s)		3			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional		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	ŏ	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	20		10			
Add money later - deferred account		Annual fixed withdrawal 80,000	Pick year(s) to remove		11 12			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal 0.0 %			13			
	0	Required minimum distribution (RMD)			14			
Asset plan allocation	Moderate Sel		Remove year to end of plan		15			
Risk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 			16 17			
			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals			19			
Account type	IRA 🗸	O 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 🔿 C	Client2 's age O Joint	O Make-up income gap based on target income			23			
Select income rider	~	O make up moone gap based on target moone		3	24			
Number of months of payout in first ye	12.0							,
Enter manual payout		Annual Savings						
		O Annual fixed savings						
Request Additional Rider Remove In								
Orange backgrounds indicate hyp	oothetical returns		Note that ente	ered va	ues WILL N	IOT roll down to	following years w	vhen blan

Step 22: Clicking: After clicking on the Pick Years green button, the term "fixed" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

				YOUR CA	ASE LIST	HELP SIGN	N OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
					+		
Account name	IRA	Structured Income Type			Income Data		
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME	Year 1		ariable	
Hypothetical return	3.0 %	Start payout non meone nuer	Pick year(s)	2		0,000	
Bonus	0.0 %		OR	3 4		0,000	
Optional		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	5		0,000	
Account description			OR	6		0,000	
Optional account company		 Liquidate account (in so many years) 				0,000	
Other			Start year for X years	°		0,000	
			0	10		0,000	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals		11		0,000	
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	12	fixed 8	0,000	
Years deferred	0	Annual percentage withdrawal 0.0 %		13	fixed 8	0,000	
24		 Required minimum distribution (RMD) 		14	fixed 8	0,000	
Asset plan allocation	Moderate Sel		Remove year to end of plan	15		0,000	
Risk level	Moderate	 Beneficial IRA RMD (based on beneficiaries life) 		16		0,000	
Horrerer	Modelate		C	17		0,000	
Account owner	~		Reset all years	18		0,000	
		Calculated Plan Withdrawals		19 20		0,000	
Account type	IRA ~	 Make-up total owners RMD from one account 		20	inked 0	5,000	
Add an income rider		 Make-up total benef RMD from one account 		22			
Based on 💿 age 🔿 0	Client2 's age 🔘 Joint	 Make-up income gap based on target income 		23			
Select income rider	~	O make up income gap based on target income		~ 24		-	
Number of months of payout in first ye	ear 12.0			4			
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove In	ncome Rider						
Orange backgrounds indicate hyp	nothetical returns		Note that enter	d values WILL N	NOT roll down to following	n vears when blar	ink
- orange sackgrounds indicate ny	porteriour recurring.		Note that enter	A TUIGED THEET	to From dominito following	j jearo mier biar	

Step 23: Save: Click on the green button Save underneath the Manage Account subheading.

					YOUR CASE LIST	SETTINGS HELP SIGN
Manage Accoun	it.					
	View / Edit Death Benefit View / Edit Actual Values					
Account name	IRA					
		Structured Income Type	ADD INCOME	V	ear Income	Variable
In ial account balance	\$2,000,000	 Start payout from income rider 	ADDINGOME		1 fixed	80,000
Hypothetical return	3.0 %	0	Pick year(s)		2 fixed	80,000
			OR		3 fixed	80,000
Bonus	0.0 %	Liquidate or annuitize		0	4 fixed 5 fixed	80,000
O <mark>r</mark> tional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		6 fixed	80,000
Account description		 Liquidate account (in so many years) 	OR		7 fixed	80,000
Optional account company		C	Contraction and the second		8 fixed	80,000
Other			Start year for X years		9 fixed	80,000
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 fixed	80,000
		Annual fixed withdrawal	Pick year(s) to remove		11 fixed 12 fixed	80,000
Acd money later - deferred account Years deferred		Annual percentage withdrawal 0.0 %	The year (b) to remote		12 fixed	80,000
rears deletted	0			0	14 fixed	80,000
Asset plan allocation	Moderate Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15 fixed	80,000
Risk level		 Beneficial IRA RMD (based on beneficiaries life) 			16 fixed	80,000
RISK level	Moderate		(c)	<u> </u>	17 fixed	80,000
Account owner	~		Reset all years		18 fixed	80,000
Assaulthing		Calculated Plan Withdrawals			19 fixed 20 fixed	80,000 80,000
Account type Add an income rider	IRA ~	 Make-up total owners RMD from one account 		<u> </u>	21	00,000
	Client2 's age O Joint	 Make-up total benef RMD from one account 			22	
		O Make-up income gap based on target income			23	
Select income rider	~			- ·	24	• •
Number of months of payout in first ye	12.0					,
Enter manual payout		Annual Savings				
		Annual fixed savings				
Request Additional Rider Remove In	come Rider					
Orange backgrounds indicate hyp	oothetical returns		Note that enter	red value	es WILL NOT roll dowr	to following years when blan

Step 24: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

	SETTINGS HELP	
CLENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR ASET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS Structured Income Planning Marking Money IRA Annu Fleed Withdraw Function Vithdrawing Money IRA Annu Fleed Withdraw Function Notice	PREPARED BY:	
Structured Income Planning Earl Save Caned Add Account At Income Add Inc Tax Add Targe Earl or Add Scenario Display Options Scenario Withdrawing Money IRA Annu Fixed Withdraw Function Concest Verar Concest Concest Verar Note Counts Planning 16 years Y IRA Incomest Year Note Counts Planning 2.000.000 Subtorial Manage IRA Incomest Manage 2.000.000 Subtorial Manage Interteum 70 3.000 Manage and of 2 72 1.959:400 8.0000 1.959:400 8.0000 1.959:400 8.0000 1.959:400 8.0000 1.959:400 8.0000 1.959:400 8.0000 <th colsp<="" td=""><td>TIAL PLAN DATE:</td></th>	<td>TIAL PLAN DATE:</td>	TIAL PLAN DATE:
Edit Save Cancel Add Account At Income Add IncTax Add Target Edit or Add Scenario Display Options Scenario Withdrawing Money IRA Annu Fixed Withdraw Function	SED PLAN DATE:	
Edit Save Cancel Add Account At Income Add IncTax Add Target Edit or Add Scenario Display Options Scenario Withdrawing Money IRA Annu Fixed Withdraw Function		
Scenario Withdrawing Money IRA Annu, Fixed Withdraw Function Accounts Accounts Income RA Income Total Distribution Year Account Income Total Distribution SS Initial amount Total Distribution SS Total Year One Account IRA Manage Manage Manage Initial amount IRA Comme SS Total Manage Initial amount IRA Comme Signal Manage Manage Withorts Ono Subtota Manage Manage Manage Manage Initial amount You Status Manage Status Manage Manage end of 1 71 1880.000 1980.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 1800.000 <td></td>		
Incomes Incomes Incomes Total Incomes Total Incomes Vear Account Incomes Vear Interval Statution Statution Vear Interval		
I to years Income Year Account Income Planned Distribution SS Total Income Year net return borus % 70 300 % IRA 2,000,000 SS Total Distribution % Year net return borus % 70 300 % IRA 2,000,000 SS Total Distribution % Year end of 1 71 1,980,000 80,000 1,980,000 1,75,12 end of 1 end of 2 end of 3 73 1,383,817 80,000 1,75,12 end of 3 end of 7 end of 7 1,38		
Manning Iorizon 16 years Icourts Planed Distribution Status Year Account Income Accounts Planed Distribution SS Total Income Year met return Initial amounts 70 2.000,000 0.00 Gounds Subtrait Menage Inf Factor Year whomus 0.00 % 00 of account Subtrait Menage Inf Factor Year end of 1 71 1.980,000 B80,000 1.990,000 B00,000 17,512 end of 2 end of 3 73 1.938,182 B00,000 17,512 98,651 end of 3 end of 4 74 1.916,327 80,000 1.954,812 80,000 end of 5 75 1.893,817 B0.000 1.893,817 B0.000 end of 6 76 1.870,682 80,000 1.954,800 99,863 end of 7 1.893,817 B0.000 1.822,153 B0.000 1.832,81 end of 7 1.893,817 B0.000 1.822,153 B0.000 1.		
Manning Iorizon 16 years Icourts Planed Distribution Status Year Account Income Accounts Planed Distribution SS Total Income Year met return Initial amounts 70 2.000,000 0.00 Gounds Subtrait Menage Inf Factor Year whomus 0.00 % 00 of account Subtrait Menage Inf Factor Year end of 1 71 1.980,000 B80,000 1.990,000 B00,000 17,512 end of 2 end of 3 73 1.938,182 B00,000 17,512 98,651 end of 3 end of 4 74 1.916,327 80,000 1.954,812 80,000 end of 5 75 1.893,817 B0.000 1.893,817 B0.000 end of 6 76 1.870,682 80,000 1.954,800 99,863 end of 7 1.893,817 B0.000 1.822,153 B0.000 1.832,81 end of 7 1.893,817 B0.000 1.822,153 B0.000 1.		
Horizon Lincome Income Account Plannon Total Vear Tet return 70 3.00 % Income Account Plannon SS Total Vear initial amount 70 3.00 % IRA 2.000.00 Subtat Menope Vear initial amount 0.00 % IRA 2.000.00 Subtat Menope Vear end of 1 71 1.880.000 1.800.00 Income 3.20 % Vear end of 2 72 1.989.400 80.000 1.980.000 1.980.000 1.980.000 1.980.000 1.980.000 1.980.000 1.993.182 80.000 1.7512 end of 2 end of 3 73 1.989.400 80.000 1.954.97 80.000 1.8572 98.072 end of 3 end of 4 74 1.916.527 80.000 1.827.85 80.000 1.92.48 end of 5 end of 7 77 1.484.750 80.000 1.822.153 80.000 2.18.82 1.00		
Year Account Income Account Total Planned Year Inet return 3.00 % IRA 2.000.00 Statut Total Year initia arount 0.00 % IRA 2.000.00 Statut Mnnnec 3.20 % whonus 2.000.00 Mnnnec 2.000.00 Statut Mnnnec 3.20 % end of 1 71 1.980.000 80.000 1.980.000 80.000 17.512 end of 2 end of 3 73 1.938.182 80.000 17.512 end of 3 end of 4 end of 5 75 1.983.817 80.000 18.651 end of 4 end of 5 75 1.983.817 80.000 19.86.30 9.94.83 end of 7 end of 6 76 1.876.82 80.000 1.86.51 9.94.83 end of 7 end of 7 1.846.750 80.000 1.86.51 9.92.83 end of 7 end of 7 77 1.846.750 80.000 2.18.52 101.499 end o		
Year Account Income Total Distribution Second Plear Initial amount bonus % 70 3.00 % IRA		
Inet return Initial around bonus % 70 3.00 % IRA Jonus % 0.00 % 0 Subtata Manage widsous 2.000.000 0 of account Inf Factor end of 1 71 1.860.000 80.000 1.69.69 96.969 end of 1 end of 2 72 1.959.400 80.000 1.98.69 96.969 end of 2 end of 3 73 1.938.102 80.000 1.93.812 80.000 18.072 end of 3 end of 4 74 1.916.327 80.000 1.93.812 80.000 1.93.823 end of 5 end of 5 75 1.829.817 80.000 1.93.823 89.648 end of 5 end of 6 76 1.870.523 80.000 1.93.823 99.648 end of 6 end of 7 77 1.846.750 80.000 1.80.72 80.000 1.94.84 99.648 end of 7 end of 7 79 1.846.750 80.000 1.94.84 99.648 end of 6 <		
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Step 25: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

										YOUR CASE LIST SETTINGS
										PREPARED BY:
										INITIAL PLAN DATE:
LIENT DASHBO	OARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	SET ALLOCATIO	ON AND NET W	TH GRAPHS REPORTS TOOLS	REVISED PLAN DATE:
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			d Income A		Add Target	Edit or Add Scen	ario Displa	y Options		
cenaric With	thdrawing Mon	ey IRA Annua	I Fixed Wtihdr	aw Function			\sim			
		Acco	ounts							
lanning	16 years ∨		IRA			Incomes				
_				Accounts	Planned	1	Total	Marca		
Year		Account	Income	Total	Distribution	SS	Income	Year		
net re urn	70	3.00 %	IRA							
itial amount		2,000,000 0.00 %		2,000,000	Subtotal of account	Manage Infl Factor				
bonus % w/bonus		2,000,000	Manage	2,000,000	incomes	3.20 %				
end of 1	71	1,980,000	80,000	1.980.000	80.000	16,969	96,969	end of 1		
end of 2	72	1,959,400	80,000	1,959,400	80,000	17,512	97,512	end of 2		
end of 3	73	1,938,182	80,000	1,938,182	80,000	18,072	98,072	end of 3		
end of 4	74	1,916,327	80,000	1,916,327	80,000	18,651	98,651	end of 4		
end of 5	75	1,893,817	80,000	1,893,817	80,000	19,248	99,248	end of 5		
end of 6	76	1,870,632	80,000	1,870,632	80,000	19,863	99,863	end of 6		
end of 7	77	1,846,750	80,000	1,846,750	80,000	20,499	100,499	end of 7		
end of 8	78	1,822,153	80,000	1,822,153	80,000	21,155	101,155	end of 8		
end of 9	79	1,796,818	80,000	1,796,818	80,000	21,832	101,832	end of 9		
end o 10	80	1,770,722	80,000	1,770,722	80,000	22,531	102,531	end of 10		
end of 11	81	1,743,844	80,000	1,743,844	80,000	23,252	103,252	end of 11		
end of 12	82	1,716,159	80,000	1,716,159	80,000	23,996	103,996	end of 12		
end of 13	83	1,687,644	80,000	1,687,644	80,000	24,764	104,764	end of 13		
end of 14	84	1,658,273	80,000	1,658,273	80,000	25,556	105,556	end of 14		
end of 15	85	1,628,021	80,000	1,628,021	80,000	26,374	106,374	end of 15		
end of 16	86	1,596,862	80,000	1,596,862	80,000	27,218	107,218	end of 16		
					1,280,000	347,490	1,627,490			

Step 26: 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.

INITIAL PLAN DAT REVISED PLAN											YOUR CASE LIST SETTINGS	
											PREPARED BY:	
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Step 27: 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
										PREPARED BY:
										INITIAL PLAN DATE:
CLIENT DASHBOA	RD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	SET ALLOCATIO	ON AND NET W	TH GRAPHS REPORTS TOOLS	REVISED PLAN DATE:
Structu	ired Ir	ncom	e Plar	nina						
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Planning 1 Horizon	years 🗸		IRA			Incomes				
Year		Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year		
net return	70	3.00 %	IRA		Distribution					
initial amount		2,000,000		2,000,000	Subtotal	Manage				
bonus %		0.00 %		0	of account	Infl Factor				
w/bonus		2,000,000	Manage	2,000,000	incomes	3.20 %				
end of 1	71	1,980,000	80,000	1,980,000	80,000	16,969	96,969	end of 1		
end of 2	72	1,959,400	80,000	1,959,400	80,000	17,512	97,512	end of 2		
end of 3	73	1,938,182	80,000	1,938,182	80,000	18,072	98,072	end of 3		
end of 4 end of 5	74 75	1,916,327 1,893,817	80,000 80,000	1,916,327 1,893,817	80,000 80,000	18,651 19,248	98,651 99,248	end of 4 end of 5		
end of 6	75	1,893,817	80,000	1,893,817	80,000	19,248	99,248	end of 5 end of 6		
end of 6 end of 7	70	1,870,632	80,000	1,870,632	80,000	20,499	99,863	end of 6 end of 7		
end of 8	78	1,846,750	80,000	1,846,750	80,000	20,499	100,499	end of 8		
end of 9	79	1,022,155	80,000	1,022,155	80,000	21,155	101,135	end of 9		
end of 10	80	1,770,722	80,000	1,770,722	80,000	22,531	102,531	end of 10		
end of 11	81	1,743,844	80,000	1,743,844	80,000	23,252	102,331	end of 11		
end of 12	82	1,745,644	80,000	1,745,644	80,000	23,252	103,252	end of 12		
end of 13	83	1,687,644	80,000	1,687,644	80,000	24,764	104,764	end of 13		
end of 14	84	1.658.273	80,000	1.658.273	80.000	25,556	105,556	end of 14		
end of 15	85	1,628,021	80,000	1,628,021	80,000	26,374	106,374	end of 15		
end of 16	86	1,596,862	80.000	1.596.862	80.000	27,218	107,218	end of 16		
0100110		1,000,002	1,280,000	1,000,002	1,280,000	347,490	1,627,490			

Step 28: 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
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