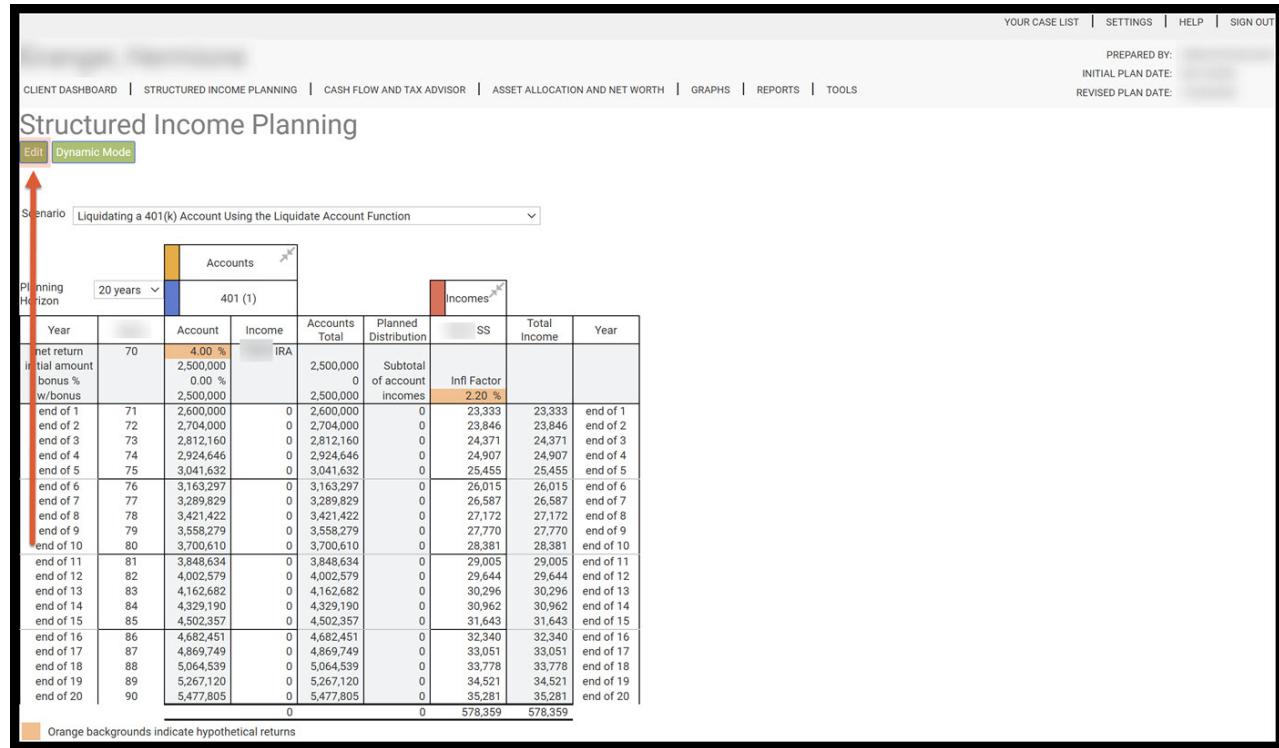


Liquidating a 401(k) Account Using the Liquidate Account Function

01/12/2026 10:31 am EST

From the structured income planning page there are multiple ways you can withdraw money from a 401(k) account. Below is a step-by-step guideline for withdrawing money from a 401(k) account using the liquidate account function.

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



The screenshot shows the 'Structured Income Planning' page. At the top, there are navigation links: 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are buttons for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. Below the header, the subheading 'Structured Income Planning' is displayed with 'Edit' and 'Dynamic Mode' buttons. An arrow points to the 'Edit' button. The main content is a table titled 'Accounts' with columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'SS', 'Total Income', and 'Year'. The table shows data for a 20-year planning horizon, starting with an initial amount of 2,500,000 and ending with a total income of 578,359. Orange backgrounds indicate hypothetical returns. A legend at the bottom left states: 'Orange backgrounds indicate hypothetical returns.'

Step 2: Manage: Click on the green manage button within the column for the 401(k) account.

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 | Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon		Accounts		Incomes	
Year	Account	Income	Accounts Total	Planned Distribution	SS
net return	70	4.00 %	2,500,000	Subtotal of account incomes	Manage Infl Factor 2.20 %
initial amount		0.00 %	2,500,000	0	
bonus % w/bonus			2,500,000	0	
end of 1	71	2,600,000	0	23,333	23,333 end of 1
end of 2	72	2,704,000	0	23,846	23,846 end of 2
end of 3	73	2,812,160	0	24,371	24,371 end of 3
end of 4	74	2,924,646	0	24,907	24,907 end of 4
end of 5	75	3,041,632	0	25,455	25,455 end of 5
end of 6	76	3,163,297	0	26,015	26,015 end of 6
end of 7	77	3,289,829	0	26,587	26,587 end of 7
end of 8	78	3,421,422	0	27,172	27,172 end of 8
end of 9	79	3,558,279	0	27,770	27,770 end of 9
end of 10	80	3,700,610	0	28,381	28,381 end of 10
end of 11	81	3,848,634	0	29,005	29,005 end of 11
end of 12	82	4,002,579	0	29,644	29,644 end of 12
end of 13	83	4,162,682	0	30,296	30,296 end of 13
end of 14	84	4,329,190	0	30,962	30,962 end of 14
end of 15	85	4,502,357	0	31,643	31,643 end of 15
end of 16	86	4,682,451	0	32,340	32,340 end of 16
end of 17	87	4,869,749	0	33,051	33,051 end of 17
end of 18	88	5,064,539	0	33,778	33,778 end of 18
end of 19	89	5,267,120	0	34,521	34,521 end of 19
end of 20	90	5,477,805	0	35,281	35,281 end of 20
		0	578,359	578,359	

Orange backgrounds indicate hypothetical returns

Option A: Pick Years:

Step 3: Structured Income Type: Click on the radio button next to Liquidate Account (in so many years).

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

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

Account name	401 (1)	Structured Income Type	ADD INCOME	Income Data
Initial account balance	\$2,500,000	Income Riders	Pick year(s)	Year 1
Hypothetical return	4.0 %	<input type="radio"/> Start payout from income rider	OR	2
Bonus	0.0 %	<input type="radio"/> Annuitize (for years certain) 1.0 %	Start year for rest of plan	3
Optional		<input type="radio"/> Liquidate account (in so many years)	OR	4
Account description		Withdrawals	Start year for X years 0	5
Optional account company		<input type="radio"/> Annual fixed withdrawal	Pick year(s) to remove	6
Other		<input type="radio"/> Annual percentage withdrawal 0.0 %	Remove year to end of plan	7
Tax calculation option	Tax Income Distributions (Qualified)	<input type="radio"/> Required minimum distribution (RMD)	Reset all years	8
Add money later - deferred account	<input type="checkbox"/>	<input type="radio"/> Beneficial IRA RMD (based on beneficiaries life)		9
Years deferred	0	Calculated Plan Withdrawals		10
Asset plan allocation	Moderate	<input type="radio"/> Make-up total owners RMD from one account		11
Risk level	Moderate	<input type="radio"/> Make-up total benefit RMD from one account		12
Account owner		<input type="radio"/> Make-up income gap based on target income		13
Account type	401k	Annual Savings		14
Add an income rider		<input type="radio"/> Annual fixed savings		15
Based on <input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint				16
Select income rider				17
Number of months of payout in first year	12.0			18
Enter manual payout	<input type="checkbox"/>			19
Request Additional Rider Remove Income Rider				20
Orange backgrounds indicate hypothetical returns		Note that entered values WILL NOT roll down to following years when blank		

Step 4: Income Data: Within the Income data table click on the Year text box that you would like to select.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders Start payout from income rider

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		
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10		
11		
12		
13		
14		
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16		
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18		
19		
20		
21		
22		
23		
24		

Withdrawals

Annual fixed withdrawal Annual percentage withdrawal 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 benefit RMD from one account Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 5: Pick Years: Click on the green button Pick Years.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders Start payout from income rider

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		

Withdrawals

Annual fixed withdrawal Annual percentage withdrawal 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 benefit RMD from one account Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 6: Clicking: After clicking on the Pick Years green button, the term "liquidate" should automatically appear in the income column of the table.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

ADD INCOME

Pick year(s) OR Start year for rest of plan OR Start year for X years Remove year to end of plan Reset all years

Income Data

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

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 benefit RMD from one account Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

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

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

ADD INCOME

Pick year(s) OR Start year for rest of plan OR Start year for X years Remove year to end of plan Reset all years

Income Data

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

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 benefit RMD from one account Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 8: 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:
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 Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon		Accounts		Incomes	
Year	Account	Income	Accounts Total	Planned Distribution	SS
net return	70	4.00 %	2,500,000	Subtotal of account incomes	Manage
initial amount		0.00 %	2,500,000		Infl Factor
bonus % w/bonus		2.20 %	2,500,000		
end of 1	71	2,600,000	0	2,600,000	23,333
end of 2	72	2,704,000	0	2,704,000	23,846
end of 3	73	2,410,540	401,620	2,410,540	24,371
end of 4	74	2,105,342	401,620	2,105,342	24,907
end of 5	75	1,787,936	401,620	1,787,936	25,455
end of 6	76	1,457,834	401,620	1,457,834	26,015
end of 7	77	1,114,528	401,620	1,114,528	26,587
end of 8	78	757,490	401,620	757,490	27,172
end of 9	79	386,170	401,620	386,170	27,770
end of 10	80	0	401,616	0	28,381
end of 11	81	0	0	0	29,005
end of 12	82	0	0	0	29,644
end of 13	83	0	0	0	30,296
end of 14	84	0	0	0	30,962
end of 15	85	0	0	0	31,643
end of 16	86	0	0	0	32,340
end of 17	87	0	0	0	33,051
end of 18	88	0	0	0	33,778
end of 19	89	0	0	0	34,521
end of 20	90	0	0	0	35,281
		3,212,953	3,212,953	578,359	3,791,312

Orange backgrounds indicate hypothetical returns

Option B: Start Years for Rest of Plan:

Step 9: Structured Income Type: Click on the radio button next to Liquidate Account (in so many years).

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

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

Account name	401 (1)	Structured Income Type	ADD INCOME
Initial account balance	\$2,500,000	Income Riders	Pick year(s)
Hypothetical return	4.0 %	Start payout from income rider	OR
Bonus	0.0 %	Liquidate or annuitize	Start year for rest of plan
Optional		Annuitize (for years certain) 1.0 %	Start year for X years
Account description		Liquidate account (in so many years)	Pick year(s) to remove
Optional account company			Remove year to end of plan
Other			Reset all years
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	
Add money later - deferred account		Annual fixed withdrawal	
Years deferred	0	Annual percentage withdrawal 0.0 %	
Asset plan allocation	Moderate	Required minimum distribution (RMD)	
Risk level	Moderate	Beneficial IRA RMD (based on beneficiaries life)	
Account owner		Calculated Plan Withdrawals	
Account type	401k	Make-up total owners RMD from one account	
Add an income rider		Make-up total benefit RMD from one account	
Based on: <input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint		Make-up income gap based on target income	
Select income rider		Annual Savings	
Number of months of payout in first year	12.0	Annual fixed savings	
Enter manual payout			

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

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

Step 10: Income Data: Within the Income data table click on the Year text box that you would like to select.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders Start payout from income rider

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		
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14		
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21		
22		
23		
24		

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 benefit RMD from one account Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 11: Start Years for Rest of Plan: Click on the green button Start Years for Rest of Plan.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders Start payout from income rider

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		

Withdrawals

Annual fixed withdrawal Annual percentage withdrawal 1.0 % 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 benefit RMD from one account Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 12: Clicking: After clicking on the Start year for Rest of Plan green button, the term "liquidate" should automatically appear in the income column of the table.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

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

Withdrawals

Annual fixed withdrawal

Annual percentage withdrawal %

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 benefit RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 13: Save: Click on the green button Save underneath the Manage Account subheading.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

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

Withdrawals

Annual fixed withdrawal

Annual percentage withdrawal %

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 benefit RMD from one account

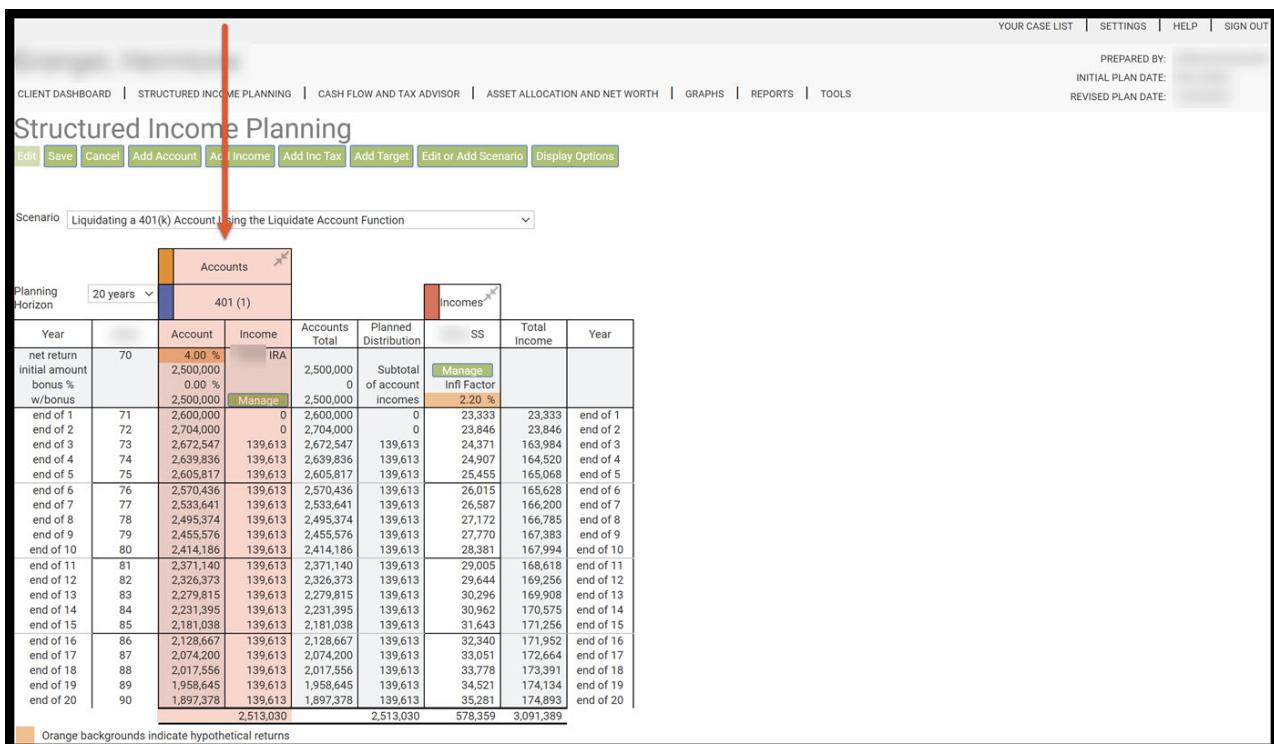
Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 14: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

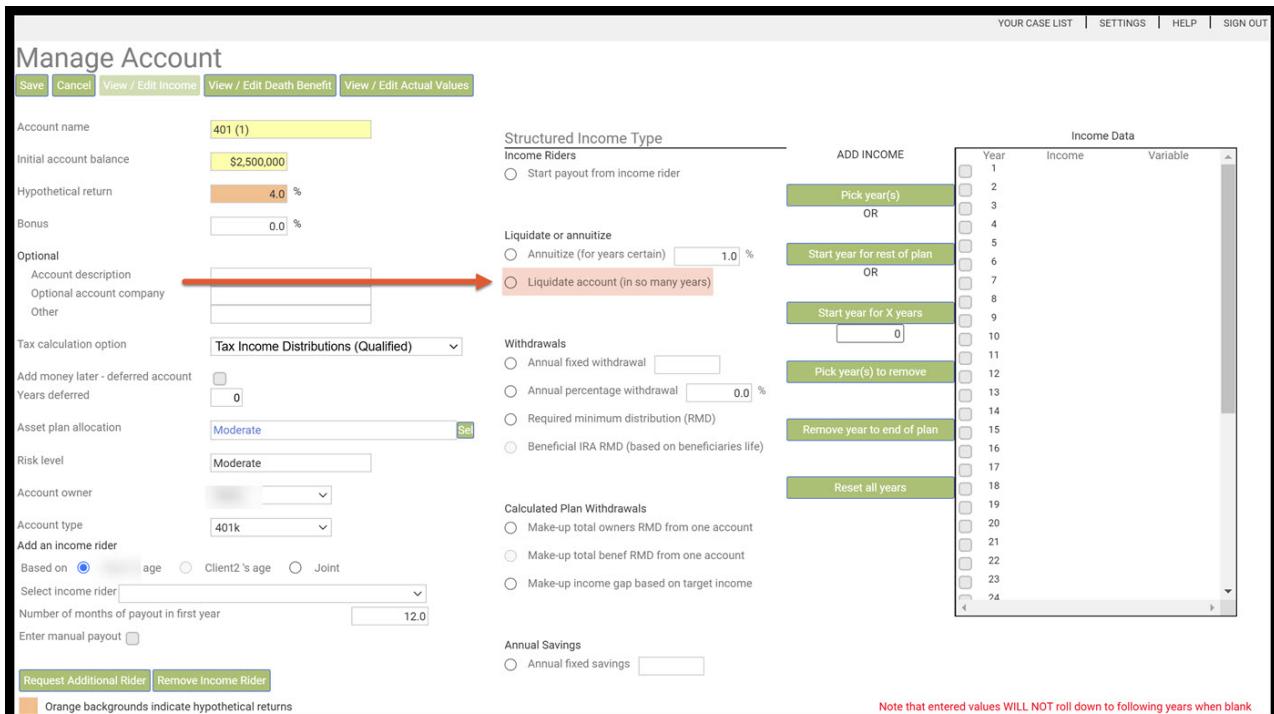


Accounts								
Planning Horizon	20 years	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	4.00 %	IRA	2,500,000	Subtotal of account incomes	23,333	23,333	
initial amount		0.00 %		0	0	23,846	23,846	end of 1
bonus % w/bonus		2.20 %		2,500,000	Manage	23,846	23,846	end of 2
end of 1	71	2,600,000	0	2,600,000	0	23,333	23,333	end of 1
end of 2	72	2,704,000	0	2,704,000	0	23,846	23,846	end of 2
end of 3	73	2,672,547	139,613	2,672,547	139,613	24,371	163,984	end of 3
end of 4	74	2,639,836	139,613	2,639,836	139,613	24,907	164,520	end of 4
end of 5	75	2,605,817	139,613	2,605,817	139,613	25,455	165,068	end of 5
end of 6	76	2,570,436	139,613	2,570,436	139,613	26,015	165,628	end of 6
end of 7	77	2,533,641	139,613	2,533,641	139,613	26,587	166,200	end of 7
end of 8	78	2,495,374	139,613	2,495,374	139,613	27,172	166,785	end of 8
end of 9	79	2,455,576	139,613	2,455,576	139,613	27,770	167,383	end of 9
end of 10	80	2,414,186	139,613	2,414,186	139,613	28,381	167,994	end of 10
end of 11	81	2,371,140	139,613	2,371,140	139,613	29,005	168,618	end of 11
end of 12	82	2,326,373	139,613	2,326,373	139,613	29,644	169,256	end of 12
end of 13	83	2,279,815	139,613	2,279,815	139,613	30,296	169,908	end of 13
end of 14	84	2,231,395	139,613	2,231,395	139,613	30,962	170,575	end of 14
end of 15	85	2,181,038	139,613	2,181,038	139,613	31,643	171,256	end of 15
end of 16	86	2,128,667	139,613	2,128,667	139,613	32,340	171,952	end of 16
end of 17	87	2,074,200	139,613	2,074,200	139,613	33,051	172,664	end of 17
end of 18	88	2,017,556	139,613	2,017,556	139,613	33,778	173,391	end of 18
end of 19	89	1,958,645	139,613	1,958,645	139,613	34,521	174,134	end of 19
end of 20	90	1,897,378	139,613	1,897,378	139,613	35,281	174,893	end of 20
		2,513,030		2,513,030		578,359	3,091,389	

Orange backgrounds indicate hypothetical returns

Option C: Start Year for X Years:

Step 15: Structured Income Type: Click on the radio button next to Liquidate Account (in so many years).



Manage Account

Structured Income Type

Income Riders

Start payout from income rider

Liquidate or annuitize

Annuitize (for years certain) %

Liquidate account (in so many years)

ADD INCOME

Pick year(s) OR

Start year for rest of plan

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		

Calculated Plan Withdrawals

Make-up total owners RMD from one account

Make-up total benefit RMD from one account

Make-up income gap based on target income

Withdrawals

Annual fixed withdrawal

Annual percentage withdrawal %

Required minimum distribution (RMD)

Beneficial IRA RMD (based on beneficiaries life)

Annual Savings

Annual fixed savings

Account name: 401 (1)

Initial account balance: \$2,500,000

Hypothetical return: 4.0 %

Bonus: 0.0 %

Optional account company:

Account description:

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: age Client2's age Joint

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

Orange backgrounds indicate hypothetical returns

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

Step 16: Income Data: Within the Income data table click on the Year text box that you would like to select.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

Annuitize (for years certain) 1.0 %

Liquidate account (in so many years)

ADD INCOME

Pick year(s) OR Start year for rest of plan OR Start year for X 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		

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 benefit RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 17: Start Year for X Years Text Box: Within the text box for Start Year for X Years, type in how many years you would like the monetary amount to be distributed.

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

Annuitize (for years certain) 1.0 %

Liquidate account (in so many years)

ADD INCOME

Pick year(s) OR Start year for rest of plan OR Start year for X 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		

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 benefit RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

Step 18: Start Year of X Years: Click on the green button Start Year for X Years.

Manage Account

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

Account name	401 (1)	Structured Income Type	ADD INCOME	Income Data
Initial account balance	\$2,500,000	Income Riders	Pick year(s)	Year Income Variable
Hypothetical return	4.0 %	<input type="radio"/> Start payout from income rider	OR	1
Bonus	0.0 %	<input type="radio"/> Annuitize (for years certain) 1.0 %	Start year for rest of plan	2
Optional		<input checked="" type="radio"/> Liquidate account (in so many years)	OR	3
Account description			Start year for X years	4
Optional account company			14	5
Other			Pick year(s) to remove	6
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	Remove year to end of plan	7
Add money later - deferred account		<input type="radio"/> Annual fixed withdrawal	Reset all years	8
Years deferred	0	<input type="radio"/> Annual percentage withdrawal 0.0 %		9
Asset plan allocation	Moderate	<input type="radio"/> Required minimum distribution (RMD)		10
Risk level	Moderate	<input type="radio"/> Beneficial IRA RMD (based on beneficiaries life)		11
Account owner		Calculated Plan Withdrawals		12
Account type	401k	<input type="radio"/> Make-up total owners RMD from one account		13
Add an income rider		<input type="radio"/> Make-up total benefit RMD from one account		14
Based on <input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint		<input type="radio"/> Make-up income gap based on target income		15
Select income rider		Annual Savings		16
Number of months of payout in first year	12.0	<input type="radio"/> Annual fixed savings		17
Enter manual payout				18
Request Additional Rider Remove Income Rider		Note that entered values WILL NOT roll down to following years when blank		
Orange backgrounds indicate hypothetical returns				

Step 19: Clicking: After clicking on the Start Year for X Years green button, the term "liquidate" should automatically appear in the income column of the table.

Manage Account

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

Account name	401 (1)	Structured Income Type	ADD INCOME	Income Data
Initial account balance	\$2,500,000	Income Riders	Pick year(s)	Year Income Variable
Hypothetical return	4.0 %	<input type="radio"/> Start payout from income rider	OR	1
Bonus	0.0 %	<input type="radio"/> Annuitize (for years certain) 1.0 %	Start year for rest of plan	2
Optional		<input checked="" type="radio"/> Liquidate account (in so many years)	OR	3
Account description			Start year for X years	4
Optional account company			0	5
Other			Pick year(s) to remove	6
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	Remove year to end of plan	7
Add money later - deferred account		<input type="radio"/> Annual fixed withdrawal	Reset all years	8
Years deferred	0	<input type="radio"/> Annual percentage withdrawal 0.0 %		9
Asset plan allocation	Moderate	<input type="radio"/> Required minimum distribution (RMD)		10
Risk level	Moderate	<input type="radio"/> Beneficial IRA RMD (based on beneficiaries life)		11
Account owner		Calculated Plan Withdrawals		12
Account type	401k	<input type="radio"/> Make-up total owners RMD from one account		13
Add an income rider		<input type="radio"/> Make-up total benefit RMD from one account		14
Based on <input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint		<input type="radio"/> Make-up income gap based on target income		15
Select income rider		Annual Savings		16
Number of months of payout in first year	12.0	<input type="radio"/> Annual fixed savings		17
Enter manual payout				18
Request Additional Rider Remove Income Rider		Note that entered values WILL NOT roll down to following years when blank		
Orange backgrounds indicate hypothetical returns				

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

Manage Account

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

Account name	401 (1)
Initial account balance	\$2,500,000
Hypothetical return	4.0 %
Bonus	0.0 %
Optional	
Account description	
Optional account company	
Other	
Tax calculation option	Tax Income Distributions (Qualified)
Add money later - deferred account	<input type="checkbox"/>
Years deferred	0
Asset plan allocation	Moderate
Risk level	Moderate
Account owner	
Account type	401k
Add an income rider	
Based on	<input checked="" type="radio"/> age <input type="radio"/> Client2's age <input type="radio"/> Joint
Select income rider	
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	

Structured Income Type

Income Riders

Start payout from income rider

ADD INCOME

Pick year(s) OR

Income Data

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

Liquidate or annuitize

Annuitize (for years certain) 1.0 %

Start year for rest of plan OR

Liquidate account (in so many years)

Start year for X years 0

Pick year(s) to remove

Remove year to end of plan

Reset all 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 benefit RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

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

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

STRUCTURED INCOME PLANNING

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: Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon: 20 years

Accounts

Year	Accounts		Incomes*		
	Account	Income	Accounts Total	Planned Distribution	SS
70	4.00 %	2,500,000	Subtotal of account incomes	2.20 %	
71	2,500,000	2,500,000	Manage		
72	0	2,704,000			
73	2,812,160	0			
74	2,924,646	0			
75	2,764,758	276,873	276,873	25,455	302,328
76	2,598,475	276,873	276,873	26,015	302,888
77	2,425,541	276,873	2425,541	26,587	303,461
78	2,245,689	276,873	2,245,689	27,172	304,046
79	2,058,643	276,873	2,058,643	27,770	304,644
80	1,864,115	276,873	1,864,115	28,381	305,254
81	1,661,806	276,873	1,661,806	29,005	305,879
82	1,451,405	276,873	1,451,405	276,873	29,644
83	1,232,588	276,873	1,232,588	276,873	30,296
84	1,005,018	276,873	1,005,018	276,873	30,962
85	768,345	276,873	768,345	276,873	31,643
86	522,205	276,873	522,205	276,873	32,340
87	266,220	276,873	266,220	276,873	33,051
88	0	276,869	0	276,869	33,778
89	0	0	0	0	34,521
90	0	0	0	0	35,281
	3,876,224		3,876,224	578,359	4,454,582

Orange backgrounds indicate hypothetical returns

Step 22: 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: Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon: 20 years

		Accounts		Incomes				
Planning Horizon		401 (1)						
Year		Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	4.00 %	IRA	2,500,000				
initial amount		2,500,000		0				
bonus %		0.00 %		2,500,000				
w/bonus		2,500,000						
end of 1	71	2,600,000	0	2,600,000	0	23,333	23,333	end of 1
end of 2	72	2,704,000	0	2,704,000	0	23,846	23,846	end of 2
end of 3	73	2,812,160	0	2,812,160	0	24,371	24,371	end of 3
end of 4	74	2,924,646	0	2,924,646	0	24,907	24,907	end of 4
end of 5	75	2,764,758	276,873	2,764,758	276,873	25,455	302,328	end of 5
end of 6	76	2,598,475	276,873	2,598,475	276,873	26,015	302,888	end of 6
end of 7	77	2,425,541	276,873	2,425,541	276,873	26,587	303,461	end of 7
end of 8	78	2,245,689	276,873	2,245,689	276,873	27,172	304,046	end of 8
end of 9	79	2,058,643	276,873	2,058,643	276,873	27,770	304,644	end of 9
end of 10	80	1,864,115	276,873	1,864,115	276,873	28,381	305,254	end of 10
end of 11	81	1,661,806	276,873	1,661,806	276,873	29,005	305,879	end of 11
end of 12	82	1,451,405	276,873	1,451,405	276,873	29,644	306,517	end of 12
end of 13	83	1,232,588	276,873	1,232,588	276,873	30,296	307,169	end of 13
end of 14	84	1,005,018	276,873	1,005,018	276,873	30,962	307,836	end of 14
end of 15	85	768,345	276,873	768,345	276,873	31,643	308,517	end of 15
end of 16	86	522,205	276,873	522,205	276,873	32,340	309,213	end of 16
end of 17	87	266,220	276,873	266,220	276,873	33,051	309,924	end of 17
end of 18	88	0	276,869	0	276,869	33,778	310,647	end of 18
end of 19	89	0	0	0	0	34,521	34,521	end of 19
end of 20	90	0	0	0	0	35,281	35,281	end of 20
		3,876,224		3,876,224		578,359	4,454,582	

Orange backgrounds indicate hypothetical returns

Step 23: 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: Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon: 20 years

		Accounts		Incomes				
Planning Horizon		401 (1)						
Year		Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	4.00 %	IRA	2,500,000				
initial amount		2,500,000		0				
bonus %		0.00 %		2,500,000				
w/bonus		2,500,000						
end of 1	71	2,600,000	0	2,600,000	0	23,333	23,333	end of 1
end of 2	72	2,704,000	0	2,704,000	0	23,846	23,846	end of 2
end of 3	73	2,812,160	0	2,812,160	0	24,371	24,371	end of 3
end of 4	74	2,924,646	0	2,924,646	0	24,907	24,907	end of 4
end of 5	75	2,764,758	276,873	2,764,758	276,873	25,455	302,328	end of 5
end of 6	76	2,598,475	276,873	2,598,475	276,873	26,015	302,888	end of 6
end of 7	77	2,425,541	276,873	2,425,541	276,873	26,587	303,461	end of 7
end of 8	78	2,245,689	276,873	2,245,689	276,873	27,172	304,046	end of 8
end of 9	79	2,058,643	276,873	2,058,643	276,873	27,770	304,644	end of 9
end of 10	80	1,864,115	276,873	1,864,115	276,873	28,381	305,254	end of 10
end of 11	81	1,661,806	276,873	1,661,806	276,873	29,005	305,879	end of 11
end of 12	82	1,451,405	276,873	1,451,405	276,873	29,644	306,517	end of 12
end of 13	83	1,232,588	276,873	1,232,588	276,873	30,296	307,169	end of 13
end of 14	84	1,005,018	276,873	1,005,018	276,873	30,962	307,836	end of 14
end of 15	85	768,345	276,873	768,345	276,873	31,643	308,517	end of 15
end of 16	86	522,205	276,873	522,205	276,873	32,340	309,213	end of 16
end of 17	87	266,220	276,873	266,220	276,873	33,051	309,924	end of 17
end of 18	88	0	276,869	0	276,869	33,778	310,647	end of 18
end of 19	89	0	0	0	0	34,521	34,521	end of 19
end of 20	90	0	0	0	0	35,281	35,281	end of 20
		3,876,224		3,876,224		578,359	4,454,582	

Orange backgrounds indicate hypothetical returns

Step 24: 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 Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon 20 years

		Accounts		Incomes				
Planning Horizon		401 (1)						
Year		Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	4.00 %	IRA	2,500,000		Subtotal of account incomes		
initial amount		2,500,000		0	0	Infl Factor		
bonus % w/bonus		0.00 %		2,500,000	Manage	2.20 %		
end of 1	71	2,600,000	0	2,600,000	0	23,333	23,333	end of 1
end of 2	72	2,704,000	0	2,704,000	0	23,846	23,846	end of 2
end of 3	73	2,812,160	0	2,812,160	0	24,371	24,371	end of 3
end of 4	74	2,924,646	0	2,924,646	0	24,907	24,907	end of 4
end of 5	75	2,764,758	276,873	2,764,758	276,873	25,455	302,328	end of 5
end of 6	76	2,598,475	276,873	2,598,475	276,873	26,015	302,888	end of 6
end of 7	77	2,425,541	276,873	2,425,541	276,873	26,587	303,461	end of 7
end of 8	78	2,245,689	276,873	2,245,689	276,873	27,172	304,046	end of 8
end of 9	79	2,058,643	276,873	2,058,643	276,873	27,770	304,644	end of 9
end of 10	80	1,864,115	276,873	1,864,115	276,873	28,381	305,254	end of 10
end of 11	81	1,661,806	276,873	1,661,806	276,873	29,005	305,879	end of 11
end of 12	82	1,451,405	276,873	1,451,405	276,873	29,644	306,517	end of 12
end of 13	83	1,232,588	276,873	1,232,588	276,873	30,296	307,169	end of 13
end of 14	84	1,005,018	276,873	1,005,018	276,873	30,962	307,836	end of 14
end of 15	85	768,345	276,873	768,345	276,873	31,643	308,517	end of 15
end of 16	86	522,205	276,873	522,205	276,873	32,340	309,213	end of 16
end of 17	87	266,220	276,873	266,220	276,873	33,051	309,924	end of 17
end of 18	88	0	276,869	0	276,869	33,778	310,647	end of 18
end of 19	89	0	0	0	0	34,521	34,521	end of 19
end of 20	90	0	0	0	0	35,281	35,281	end of 20

3,876,224 3,876,224 578,359 4,454,582

Orange backgrounds indicate hypothetical returns

Step 25: 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 Liquidating a 401(k) Account Using the Liquidate Account Function

Planning Horizon 20 years

		Accounts		Incomes				
Planning Horizon		401 (1)						
Year		Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	4.00 %	IRA	2,500,000		Subtotal of account incomes		
initial amount		2,500,000		0	0	Infl Factor		
bonus % w/bonus		0.00 %		2,500,000	Manage	2.20 %		
end of 1	71	2,600,000	0	2,600,000	0	23,333	23,333	end of 1
end of 2	72	2,704,000	0	2,704,000	0	23,846	23,846	end of 2
end of 3	73	2,812,160	0	2,812,160	0	24,371	24,371	end of 3
end of 4	74	2,924,646	0	2,924,646	0	24,907	24,907	end of 4
end of 5	75	2,764,758	276,873	2,764,758	276,873	25,455	302,328	end of 5
end of 6	76	2,598,475	276,873	2,598,475	276,873	26,015	302,888	end of 6
end of 7	77	2,425,541	276,873	2,425,541	276,873	26,587	303,461	end of 7
end of 8	78	2,245,689	276,873	2,245,689	276,873	27,172	304,046	end of 8
end of 9	79	2,058,643	276,873	2,058,643	276,873	27,770	304,644	end of 9
end of 10	80	1,864,115	276,873	1,864,115	276,873	28,381	305,254	end of 10
end of 11	81	1,661,806	276,873	1,661,806	276,873	29,005	305,879	end of 11
end of 12	82	1,451,405	276,873	1,451,405	276,873	29,644	306,517	end of 12
end of 13	83	1,232,588	276,873	1,232,588	276,873	30,296	307,169	end of 13
end of 14	84	1,005,018	276,873	1,005,018	276,873	30,962	307,836	end of 14
end of 15	85	768,345	276,873	768,345	276,873	31,643	308,517	end of 15
end of 16	86	522,205	276,873	522,205	276,873	32,340	309,213	end of 16
end of 17	87	266,220	276,873	266,220	276,873	33,051	309,924	end of 17
end of 18	88	0	276,869	0	276,869	33,778	310,647	end of 18
end of 19	89	0	0	0	0	34,521	34,521	end of 19
end of 20	90	0	0	0	0	35,281	35,281	end of 20

3,876,224 3,876,224 578,359 4,454,582

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