View % Distribution Function

11/08/2024 12:51 pm EST

On the structured income planning page, you can view the percentage distribution for the account. This function is available through the display options. Below is a step-by-step guideline for displaying the percentage distribution.

Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.

														YOUR CASE L	IST SETTINGS	HEL	SIGN OU
															PREPARED	BY:	
															INITIAL PLAN D	TE:	
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET	WORTH G	RAPHS REF	PORTS TO	OLS			REVISED PLAN D	TE:	
Structu	ured li	ncom	e Plar	nnina													
Edit Dynamic	Mode			5													
1																	
Scenario View	ving % Distrib	ution					~										
				Acco	unts		×										
Planning Herizon	20 years 🗸	Savings	/Checking	Rot	th IRA	40	01(k)			Incomes							
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year					
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA						1				
in tial amount		200,000		1,000,000		1,000,000	_	2,200,000	Subtotal	In O Franker							
bonus %		200.000		1 000 000		1 000 000		2 200 000	of account	Inti Factor							
end of 1	71	188.020	12.000	1,006,000	34.000	986.000	34.000	2,200,000	80.000	27.999	107,999	end of 1	-				
end of 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	28,615	108,615	end of 2					
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 3					
end of 4	74	152,073	12,000	1,025,478	34,000	942,297	34,000	2,119,849	80,000	29,888	109,888	end of 4					
end of 5	75	140,088	12,000	1,032,498	34,000	927,143	34,000	2,099,729	80,000	30,545	110,545	end of 5					
end of 6	76	128,102	12,000	1,039,798	34,000	911,686	34,000	2,079,586	80,000	31,217	111,217	end of 6					
end of /	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	31,904	111,904	end of /					
end of 8	78	02 127	12,000	1,055,285	34,000	8/9,838	34,000	2,039,250	80,000	32,606	112,000	end of 8					
end of 10	80	80 146	12,000	1,003,490	34,000	846 704	34,000	1 998 886	80,000	34 057	114 057	end of 10					
end of 11	81	80,154	0	1.114.917	0 1,000	863.638	0 1,000	2.058.709	0	34.806	34.806	end of 11					
end of 12	82	80,162	0	1,159,514	0	880,911	0	2,120,587	0	35,571	35,571	end of 12					
end of 13	83	80,170	0	1,205,894	0	898,529	0	2,184,594	0	36,354	36,354	end of 13					
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14					
end of 15	85	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15					
end of 16	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16					
end of 17	8/	80,202	0	1,410,/26	0	9/2,596	0	2,463,524	0	39,660	39,660	end of 17					
end of 19	89	80,218	0	1,525,841	0	1.011.889	0	2,039,413	0	40,535	41,425	end of 19					
end of 20	90	80,226	0	1,586,874	o	1,032,127	0	2,699,228	0	42,336	42,336	end of 20					
	1000		120,000		340,000		340,000	-,,-,	800,000	694,016	1,494,016						
Orange ba	ckarounds in	dicate hypoth	etical returns	6													
	J																

Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning subheading.

													YOUR CASE LIS	T SETTINGS	HELP S
														PREPARED B	6
														INITIAL PLAN DAT	8
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	WORTH 0	RAPHS REF	ORTS TO	OLS		REVISED PLAN DAT	
Struct	ured lu	ncom	e Plar	nina											
onuon	urcu n	100111	CTIU	inning											
Edit Save C	Cancel Add A	Account	d Income A	dd Inc Tax	Add Target	Edit or Add So	enario Disp	lay Options	-						
Scenario Viev	wing % Distrib	ution					~								
				Acco	unts		×								
Planning Horizon	20 years 🗸	Savings	/Checking	Ro	th IRA	40	01(k)			Incomes					
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year			
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA								
initial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal	Manage					
w/honus		200.000	Managa	1 000 000	Managa	1 000 000	Managa	2 200 000	incomes	2 20 %					
end of 1	71	188.020	12.000	1,006,000	34.000	986.000	34,000	2,180,020	80.000	27,999	107.999	end of 1			
end of 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	28,615	108,615	end of 2			
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 3			
end of 4	74	152,073	12,000	1,025,478	34,000	942,297	34,000	2,119,849	80,000	29,888	109,888	end of 4			
end of 5	75	140,088	12,000	1,032,498	34,000	927,143	34,000	2,099,729	80,000	30,545	110,545	end of 5			
end of 6	76	128,102	12,000	1,039,798	34,000	911,686	34,000	2,079,586	80,000	31,217	111,217	end of 6			
end of 8	78	104 126	12,000	1,047,389	34,000	879,920	34,000	2,059,424	80,000	31,904	112 606	end of 8			
end of 9	79	92,137	12,000	1.063.496	34.000	863,435	34.000	2.019.068	80.000	33.323	113.323	end of 9			
end of 10	80	80,146	12,000	1,072,036	34,000	846,704	34,000	1,998,886	80,000	34,057	114,057	end of 10			
end of 11	81	80,154	0	1,114,917	0	863,638	0	2,058,709	0	34,806	34,806	end of 11			
end of 12	82	80,162	0	1,159,514	0	880,911	0	2,120,587	0	35,571	35,571	end of 12			
end of 13	83	80,170	0	1,205,894	0	898,529	0	2,184,594	0	36,354	36,354	end of 13			
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14			
end of 15	85	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15			
end of 16	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16			
end of 18	88	80,202	0	1,410,720	0	972,596	0	2,403,524	0	40 533	40 533	end of 18			
end of 19	89	80,218	0	1.525.841	0	1.011.889	0	2.617.948	0	41,425	41,425	end of 19			
end of 20	90	80,226	0	1,586,874	0	1,032,127	0	2,699,228	0	42,336	42,336	end of 20			
			120,000		340,000		340,000		800,000	694,016	1,494,016				
Orange ba	ckarounds in	dicate hypoth	etical returns												

Step 3: View % Distribution: Click on the green View % Distribution button located in Column Display Options Table.

Column Display Options View RMD Checks	Hide Income Riders View I	Death Benefit	View % Di	stribution	Comparison	View Tax R	ates View Calendar Year	rs		
				-						
Accor	unt and Income Grou	ping					Group	o Setup		
	Accounts						Acc	counts		
On the state state state	Group 1	Group 2	Group 3	Group 4	Group 5		Title		Color	
Savings/Checking	•	0	0	0	0	Group 1	Accounts			Sel
Roth IRA		0	0	0	0	Group 2				Sel
401(k)		0	0	0	0	Group 4				Sel
	Incomes					Group 5				Sel
SS	۲	0	0	0	0	l oroup o				
							In	ncomes		
Account or income groups must be created in the sequent	al order from left to right as	s they appear	in the Incom	ie Plan.			Title		Color	_
You may have to re-order accounts using the Edit Scenario	nunction to achieve the seq	the above gro	int for your a	ion be react	groups.	Group 1	Incomes			Sel
Reordering of adding accounts of incomes on the Edit Sce	nano runcuon requires mat	the above gro	up informat	ion be reset.		Group 2				Sel
						Group 3				Sel
Reset Condense All Oncondense All						Group 5				Sel
						Reset T	itle / Colors Copy Setup	To All Scenarios		
							cob) coub			
										-
Return With Grouping Return Without Grouping										

Step 4: Structured Income Planning Page: A new column called Percent Distribution will appear in the Structured Income Plan.

														YOUR CASE LIST SETTINGS HELP SIGN OU
										1				PREPARED BY:
														INITIAL PLAN DATE:
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	WORTH (RAPH R	EPORTS TO	OLS		REVISED PLAN DATE:
Structu	urad lu	ncom	o Plar	nina										
Structt	areu n	ICOIII	eriai	ming										
Edit Save C	ancel Add A	Account Ad	d Income A	dd Inc Tax 🗸	Add Target	dit or Add Sc	enario Disp	lay Options						
Scenario View	ving % Distrib	ution					~							
				Acco	unte		×							
				ACCO	unto	_								
Horizon	20 years ∨	Savings	/Checking	Ro	th IRA	40	01(k)			•	Incomes			
Year	1000	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	SS	Total Income	Year	
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA							
initial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal		Manage			
bonus %		0.00 %		0.00 %		0.00 %		2 200 000	of account		Infl Factor			
end of 1	71	188,020	12 000	1,000,000	Manage 34,000	986,000	Manage 34,000	2,200,000	80.000	3.64 %	27.999	107 999	end of 1	
end of 2	72	176.039	12,000	1.012.240	34.000	971,720	34,000	2,159,999	80.000	3.67 %	28.615	108.615	end of 2	
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	3.70 %	29,245	109,244	end of 3	
end of 4	74	152,073	12,000	1,025,478	34,000	942,297	34,000	2,119,849	80,000	3.74 %	29,888	109,888	end of 4	
end of 5	75	140,088	12,000	1,032,498	34,000	927,143	34,000	2,099,729	80,000	3.77 %	30,545	110,545	end of 5	
end of 6	76	128,102	12,000	1,039,798	34,000	911,686	34,000	2,079,586	80,000	3.81 %	31,217	111,217	end of 6	
end of 7	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	3.85 %	31,904	111,904	end of 7	
end of 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	3.89 %	32,606	112,606	end of 8	
end of 9	79	92,137	12,000	1,063,496	34,000	803,435	34,000	2,019,068	80,000	3.92 %	33,323	113,323	end of 9	
end of 11	91	90,140	12,000	1,072,030	34,000	963 639	34,000	2,059,000	00,000	0.00 %	34,057	24,906	end of 11	
end of 12	82	80 162	0	1 1 59 514	0	880 911	0	2,030,709	0	0.00 %	35 571	35 571	end of 12	
end of 13	83	80,170	ő	1,205,894	ő	898.529	0	2,184,594	ő	0.00 %	36.354	36.354	end of 13	
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	0.00 %	37,154	37,154	end of 14	
end of 15	85	80,186	0	1,304,295	0	934,829	0	2,319,311	0	0.00 %	37,971	37,971	end of 15	
end of 16	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	0.00 %	38,807	38,807	end of 16	
end of 17	87	80,202	0	1,410,726	0	972,596	0	2,463,524	0	0.00 %	39,660	39,660	end of 17	
end of 18	88	80,210	0	1,467,155	0	992,048	0	2,539,413	0	0.00 %	40,533	40,533	end of 18	
end of 19	89	80,218	0	1,525,841	0	1,011,889	0	2,617,948	0	0.00 %	41,425	41,425	end of 19	
end of 20	90	80,226	0	1,586,874	0	1,032,127	0	2,699,228	0	0.00 %	42,336	42,336	end of 20	
	10 10 10 10		120,000		340,000		340,000		800,000		694,016	1,494,016		
Orange ba	ckgrounds in	dicate hypoth	etical returns											

Step 5: Display Options: Click on the green Display Option button underneath the Structured Income Planning subheading.

														YOUR CASE LIST SETTINGS	HELP SIGN OUT
														PREPARED BY:	
														INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	ION AND NET	WORTH (SRAPHS R	EPORTS TO	OLS		REVISED PLAN DATE:	
Structu	ired li	ncom	o Plar	nnina											
Structu	areu n	ICOIII	CTIU	mining					1						
Edit Save C	ancel Add A	Account Ad	d Income A	dd Inc Tax	Add Target	dit or Add Sc	enario Disp	ay Options	-						
Scenario Man	via a % Diatrib														
View	ving % Distribu	Juon					~								
	1			Acco	unte		×								
				ACCO	unts										
Horizon	20 years ∨	Savings	/Checking	Ro	th IRA	40	01(k)				Incomes				
Year	1000	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	SS	Total Income	Year		
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA								
initial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal		Manage Infl Factor				
w/bonus		200,000	Manage	1,000,000	Manage	1,000,000	Manage	2,200,000	incomes		2.20 %				
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	34,000	2,180,020	80,000	3.64 %	27,999	107,999	end of 1		
end of 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	3.67 %	28,615	108,615	end of 2		
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	3.70 %	29,245	109,244	end of 3		
end of 4	74	152,073	12,000	1,025,478	34,000	942,297	34,000	2,119,849	80,000	3.74 %	29,888	109,888	end of 4		
end of 6	75	128 102	12,000	1,032,490	34,000	927,145	34,000	2,099,729	80,000	3.77 %	30,343	111 217	end of 6		
end of 7	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	3.85 %	31,904	111,904	end of 7		
end of 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	3.89 %	32,606	112,606	end of 8		
end of 9	79	92,137	12,000	1,063,496	34,000	863,435	34,000	2,019,068	80,000	3.92 %	33,323	113,323	end of 9		
end of 10	80	80,146	12,000	1,072,036	34,000	846,704	34,000	1,998,886	80,000	3.96 %	34,057	114,057	end of 10		
end of 11	81	80,154	0	1,114,917	0	863,638	0	2,058,709	0	0.00 %	34,806	34,806	end of 11		
end of 12	82	80,162	0	1,159,514	0	880,911	0	2,120,587	0	0.00 %	35,571	35,571	end of 12		
end of 13	03	80,170	0	1,205,894	0	090,529	0	2,104,094	0	0.00 %	30,354	30,334	end of 13		
end of 15	85	80,186	0	1 304 295	0	934 829	0	2,200,000	0	0.00 %	37 971	37 971	end of 15		
end of 16	86	80,194	0	1,356,467	0	953,526	0	2.390,187	0	0.00 %	38.807	38,807	end of 16		
end of 17	87	80,202	0	1,410,726	0	972,596	0	2,463,524	0	0.00 %	39,660	39,660	end of 17		
end of 18	88	80,210	0	1,467,155	0	992,048	0	2,539,413	0	0.00 %	40,533	40,533	end of 18		
end of 19	89	80,218	0	1,525,841	0	1,011,889	0	2,617,948	0	0.00 %	41,425	41,425	end of 19		
end of 20	90	80,226	0	1,586,874	0	1,032,127	0	2,699,228	0	0.00 %	42,336	42,336	end of 20		
			120,000		340,000		340,000		800,000		694,016	1,494,016			
Orange ba	ckgrounds ind	dicate hypoth	etical returns												

Step 6: Hide % Distribution: Click on the green Hide % Distribution button located in Column Display Options Table.

Column Display Options View RMD Checks H	lide Income Riders View	Death Benefit	Hide % Dis	stribution	Comparison	View Tax R	View Calendar Years		
			1						
Ассон	unt and Income Grou	ping					Group Setup		
	Accounts	00	0	0	0		Accounts	0.1.	
On the Observation	Group 1	Group 2	Group 3	Group 4	Group 5	0	Inte	Color	
Savings/Checking		0	0	0	0	Group 1	Accounts		Sel
Roth IRA		0	0	0	0	Group 2			Sel
401(K)		0	0	0	0	Group 3			Sei
	Incomes					Group 4			Sei
SS		0	0	0	0	Group 5			Sei
						11	Incomes		
Account or income groups must be created in the sequenti	ial order from left to right as	s they appear i	n the Incom	e Plan.			Title	Color	
You may have to re-order accounts using the Edit Scenario	function to achieve the sec	luence you wa	nt for your a	account/income	groups.	Group 1	Incomes		Sel
Reordering or adding accounts or incomes on the Edit Scen	nario function requires that	the above gro	up informati	ion be reset.		Group 2			Sel
						Group 3			Sel
Reset Condense All Uncondense All						Group 4			Sel
						Group 5			Sel
						Reset T	itle / Colors Copy Setup To All Scenarios		
Return With Grouping Return Without Grouping									

Step 7: Structured Income Planning Page: The Percent Distribution Column will be removed from the Structured Income Plan.

													YOUR CASE LIST SETTINGS HELP SI
(PREPARED BY:
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET		GRAPHS REF	PORTS TO	OLS	INITIAL PLAN DATE: REVISED PLAN DATE:
Structu	urod lu	acom	o Plar	nina									
					dd Targot	dit or Add So	oparia Dian	lay Options					
Edit Save Ca	Add A	Add	a income Ad		du laiger	un or Add Sc	Disp	ay Options					
Scenario View	ving % Distribu	ution					\sim						
		_					~						
				Acco	unts		7						
Planning Horizon	20 years 🗸	Savings	/Checking	Rot	th IRA	40	01(k)		+	Incomes			
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned	SS	Total	Year]
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA						1
initial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal	Manage Infl Easter			
w/honus		200.000	Manage	1 000 000	Manage	1 000 000	Manage	2 200 000	incomes	2 20 %			
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	34,000	2,180,020	80,000	27,999	107,999	end of 1	1
end of 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	28,615	108,615	end of 2	
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 3	
end of 4	74	152,073	12,000	1,025,478	34,000	942,297	34,000	2,119,849	80,000	29,888	109,888	end of 4	
end of 5	75	140,088	12,000	1,032,498	34,000	927,143	34,000	2,099,729	80,000	30,545	111,545	end of 5	
end of 7	70	116 115	12,000	1,039,798	34,000	895,920	34,000	2,079,580	80,000	31,217	111,217	end of 7	
end of 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	32,606	112,606	end of 8	
end of 9	79	92,137	12,000	1,063,496	34,000	863,435	34,000	2,019,068	80,000	33,323	113,323	end of 9	
end of 10	80	80,146	12,000	1,072,036	34,000	846,704	34,000	1,998,886	80,000	34,057	114,057	end of 10	
end of 11	81	80,154	0	1,114,917	0	863,638	0	2,058,709	0	34,806	34,806	end of 11	
end of 12	82	80,162	0	1,159,514	0	880,911	0	2,120,587	0	35,571	35,571	end of 12	
end of 14	84	80,170	0	1 254 120	0	916 499	0	2,164,594	0	30,354	30,354	end of 14	
end of 15	85	80,186	0	1.304.295	0	934.829	0	2.319.311	0	37,971	37,971	end of 15	
end of 16	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16	1
end of 17	87	80,202	0	1,410,726	0	972,596	0	2,463,524	0	39,660	39,660	end of 17	
end of 18	88	80,210	0	1,467,155	0	992,048	0	2,539,413	0	40,533	40,533	end of 18	
end of 19	89	80,218	0	1,525,841	0	1,011,889	0	2,617,948	0	41,425	41,425	end of 19	
end of 20	90	80,226	0	1,586,874	0	1,032,127	0	2,699,228	0	42,336	42,336	end of 20	1
			120,000		340,000		340,000		800,008	694,016	1,494,016		
Orange ba	ckgrounds inc	ficate hypoth	etical returns										

Step 8: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

													YOUR CASE LIST SETTINGS HELP SIGN C
													PREPARED BY:
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A		SSET ALLOCAT	ION AND NET	WORTH G	RAPHS REF	ORTS TO	OLS	INITIAL PLAN DATE:
<u>.</u>			DI										REFICE FERRER.
Struct	ured li	ncom	e Plan	ning									
Edit Save C	Cancel Add A	Account Add	i Income Ad	id Inc Tax 🛛 A	dd Target	dit or Add Sc	enario Disp	ay Options					
Scenario	uing % Distribu	ition											
View	wing % Distribu	non					÷						
				Acco	unts		×						
Planning	20 years 🗸	Savings	/Checking	Rot	th IRA	40	01(k)			Incomes			
Yea	-	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	
net re urn	70	0.01 %		4.00 %	IRA	2.00 %	IRA	2 200 000	Cubtetel				
bonu %		0.00 %		0.00 %		0.00 %		2,200,000	of account	Infl Factor			
w/bo us		200,000	Manage	1,000,000	Manage	1,000,000	Manage	2,200,000	incomes	2.20 %			
end c 1	71	188,020	12,000	1,006,000	34,000	986,000	34,000	2,180,020	80,000	27,999	107,999	end of 1	
end c 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	28,615	108,615	end of 2	
end c 3	73	164,050	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 3	
end c 5	75	140.088	12,000	1.032.498	34,000	927.143	34,000	2,099,729	80.000	30,545	110,545	end of 5	
end c 6	76	128,102	12,000	1,039,798	34,000	911,686	34,000	2,079,586	80,000	31,217	111,217	end of 6	
end c 7	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	31,904	111,904	end of 7	
end c 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	32,606	112,606	end of 8	
end of 9	79	92,137	12,000	1,063,496	34,000	863,435	34,000	2,019,068	80,000	33,323	113,323	end of 9	
end of 11	80	80,140	12,000	1,072,030	34,000	840,704	34,000	1,998,880	80,000	34,057	24 906	end of 10	
end of 12	82	80,154	0	1 159 514	0	880 911	0	2,038,709	0	35 571	35,571	end of 12	
end of 13	83	80,170	0	1,205,894	Ő	898,529	ő	2,184,594	0	36,354	36,354	end of 13	
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14	
end of 15	85	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15]
end of 16	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16	
end of 17	87	80,202	0	1,410,726	0	972,596	0	2,463,524	0	39,660	39,660	end of 17	
end of 19	89	80,210	0	1 525 841	0	1 011 889	0	2,039,413	0	40,533	40,555	end of 19	
end of 20	90	80,226	0	1,586,874	0	1,032,127	0	2,699,228	0	42,336	42,336	end of 20	
			120,000		340,000		340,000		800,000	694,016	1,494,016		
Orange ba	ackgrounds inc	dicate hypoth	etical returns										

Step 9: 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 HEL
													PREPARED BY:
				1									INITIAL PLAN DATE:
LIENT DASHB	DARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	FION AND NET	WORTH G	RAPHS REF	PORTS TO	OLS	REVISED PLAN DATE:
struct	ured I	ncom	e Plar	nina									
dit Dynam	c Mode		0 1 101	ming									
	ie mode												
enario Vie	wing % Distrib	ution					~						
				Acco	unts		×						
oning	00					_					í.		
izon	20 years V	Savings	/Checking	Rot	th IRA	40	01(k)			Incomes			
Year		Account	Income	Account	Income	Account	Income	Accounts	Planned	SS	Total	Year	
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA	Total	Distribution	_	income		
tial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal	Infl Footor			
w/bonus		200.000		1.000.000		1.000.000		2.200.000	incomes	2.20 %			
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	34,000	2,180,020	80,000	27,999	107,999	end of 1	
end of 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	28,615	108,615	end of 2	
end of 4	74	152,073	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 4	
end of 5	75	140,088	12,000	1,032,498	34,000	927,143	34,000	2,099,729	80,000	30,545	110,545	end of 5	
end of 6	76	128,102	12,000	1,039,798	34,000	911,686	34,000	2,079,586	80,000	31,217	111,217	end of 6	
end of 7	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	31,904	111,904	end of 7	
end of 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	32,606	112,606	end of 8	
end of 10	80	80,146	12,000	1.072.036	34,000	846.704	34,000	1.998.886	80,000	34.057	113,323	end of 10	
end of 11	81	80,154	0	1,114,917	0	863,638	0	2,058,709	0	34,806	34,806	end of 11	
end of 12	82	80,162	0	1,159,514	0	880,911	0	2,120,587	0	35,571	35,571	end of 12	
end of 13	83	80,170	0	1,205,894	0	898,529	0	2,184,594	0	36,354	36,354	end of 13	
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14	
end of 15	86	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15	
end of 17	87	80,202	0	1.410.726	0	972.596	0	2,463.524	0	39,660	39,660	end of 17	
end of 18	88	80,210	0	1,467,155	0	992,048	0	2,539,413	0	40,533	40,533	end of 18	
end of 19	89	80,218	0	1,525,841	0	1,011,889	0	2,617,948	0	41,425	41,425	end of 19	
	90	80,226	0	1,586,874	0	1,032,127	0	2,699,228	0	42,336	42,336	end of 20	
end of 20	1 10												

Step 10: 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
													PREPARED BY:
													INITIAL PLAN DATE:
CLIENT DASHBOA	ARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	TON AND NET	WORTH 0	RAPHS REF	PORTS TO	OLS	REVISED PLAN DATE:
Structu	ired I	ncom	o Plar	nnina									
onucit	incu i	loonn	CTIU	inning									
Edit Save Ca	ancel Add	Account	d Income A	dd Inc Tax	Add Target	dit or Add Sc	enario Disp	lay Options					
One sector in the sector of th	T												
Cenario View	ing % Distrib	ution					~						
							*						
				Acco	unts		7						
Planning	2 years ∽	Onder	(Ob a shine		104		22(1)						
Horizon		Savings	/Спескіпд	RO		4	J1(к)			incomes.			
Year	-	Account	Income	Account	Income	Account	Income	Accounts	Planned	SS	Total	Year	
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA						
initial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal	Manage Infl Easter			
w/bonus		200.000	Manage	1.000.000	Manage	1.000.000	Manage	2.200.000	incomes	2.20 %			
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	34,000	2,180,020	80,000	27,999	107,999	end of 1	
end of 2	72	176,039	12,000	1,012,240	34,000	971,720	34,000	2,159,999	80,000	28,615	108,615	end of 2	
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 3	
end of 5	75	140.088	12,000	1,023,478	34,000	927.143	34,000	2,099,729	80,000	30.545	110,545	end of 5	
end of 6	76	128,102	12,000	1,039,798	34,000	911.686	34,000	2.079.586	80,000	31,217	111,217	end of 6	
end of 7	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	31,904	111,904	end of 7	
end of 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	32,606	112,606	end of 8	
end of 9	79	92,137	12,000	1,063,496	34,000	863,435	34,000	2,019,068	80,000	33,323	113,323	end of 9	
end of 10	80	80,146	12,000	1,072,036	34,000	846,704	34,000	1,998,886	80,000	34,057	114,057	end of 10	
end of 12	82	80,154	0	1,114,917	0	880,911	0	2,058,709	0	34,808	34,000	end of 11	
end of 13	83	80,170	0	1,205,894	0	898.529	ő	2,184,594	0	36.354	36.354	end of 12	
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14	
end of 15	85	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15	
end of 16	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16	
end of 17	87	80,202	0	1,410,726	0	972,596	0	2,463,524	0	39,660	39,660	end of 17	
end of 18	88	80,210	0	1,467,155	0	992,048	0	2,539,413	0	40,533	40,533	end of 18	
end of 20	90	80,276	0	1,525,841	0	1.032.127	0	2,617,948	0	41,425	42,336	end of 20	
		00,220	120,000	1,000,074	340,000	.,002,127	340,000	2,033,620	800,000	694,016	1,494,016		
Orange bar	skarounde in	dicate hypoth	etical returns	-									

Step 11: 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
													PREPARED BY: INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSET ALLOCAT	TION AND NET	WORTH G	RAPHS REF	PORTS TO	OLS	REVISED PLAN DATE:	
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Silucii	lieu ii	ICOIII	e Fiai	Inning										
Edit Dynamic	Mode													
Scenario Viev	ving % Distrib	ution					~							
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				Acco	unts		7							
Planning	20 years 🗸	0	101-11-11				04(1)							
Horizon		Savings	Checking	Rot	th IRA	40	01(k)			Incomes				
Year		Account	Income	Account	Income	Account	Income	Accounts	Planned	SS	Total	Year		
net return	70	0.01 %		4.00 %	IRA	2.00 %	IRA	rotar	Distribution	_	income			
initial amount		200,000		1,000,000		1,000,000		2,200,000	Subtotal					
bonus %		0.00 %		0.00 %		0.00 %		2 200 000	of account	Infl Factor				
end of 1	71	188.020	12,000	1,000,000	34,000	986,000	34,000	2,200,000	80,000	27.000	107 999	end of 1		
end of 2	72	176.039	12,000	1,012,240	34,000	971 720	34,000	2 159 999	80,000	28,615	108.615	end of 2		
end of 3	73	164,056	12,000	1,018,729	34,000	957,154	34,000	2,139,940	80,000	29,245	109,244	end of 3		
end of 4	74	152,073	12,000	1,025,478	34,000	942,297	34,000	2,119,849	80,000	29,888	109,888	end of 4		
end of 5	75	140,088	12,000	1,032,498	34,000	927,143	34,000	2,099,729	80,000	30,545	110,545	end of 5		
end of 6	76	128,102	12,000	1,039,798	34,000	911,686	34,000	2,079,586	80,000	31,217	111,217	end of 6		
end of 7	77	116,115	12,000	1,047,389	34,000	895,920	34,000	2,059,424	80,000	31,904	111,904	end of 7		
end of 8	78	104,126	12,000	1,055,285	34,000	879,838	34,000	2,039,250	80,000	32,606	112,606	end of 8		
end of 9	79	92,137	12,000	1,063,496	34,000	863,435	34,000	2,019,068	80,000	33,323	113,323	end of 9		
end of 10	80	80,146	12,000	1,072,036	34,000	846,/04	34,000	1,998,886	80,000	34,057	24.906	end of 10		
end of 12	82	80,154	0	1 159 514	0	880 911		2,056,709	0	34,000	35,571	end of 12		
end of 13	83	80,170	0	1.205.894	0	898.529	0	2.184.594	0	36,354	36,354	end of 13		
end of 14	84	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14		
end of 15	85	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15		
	86	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16		
end of 16	07	80,202	0	1,410,726	0	972,596	0	2,463,524	0	39,660	39,660	end of 17		
end of 16 end of 17	8/			1 467 155	0	992 048	0	2,539,413	0	40,533	40,533	end of 18		
end of 16 end of 17 end of 18	88	80,210	0	1,407,155	0									
end of 16 end of 17 end of 18 end of 19	87 88 89	80,210 80,218	0	1,525,841	0	1,011,889	0	2,617,948	0	41,425	41,425	end of 19		

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or support@planscout.com.