

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.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: CLIENT DASHBOARD, STRUCTURED INCOME PLANNING, CASH FLOW AND TAX ADVISOR, ASSET ALLOCATION AND NET WORTH, GRAPHS, REPORTS, TOOLS. On the right, there are links for YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below the navigation, there are fields for PREPARED BY, INITIAL PLAN DATE, and REVISED PLAN DATE. The main heading is 'Structured Income Planning' with an 'Edit' button highlighted by an orange arrow and a 'Dynamic Mode' button. Below this is a 'Scenario' dropdown set to 'Viewing % Distribution'. The main table displays account balances and income over a 20-year period. The table has columns for Year, Account, Income, Accounts Total, Planned Distribution, SS, Total Income, and Year. The table is divided into sections for Savings/Checking, Roth IRA, and 401(k). The 'Infl Factor' is set to 2.20%. The table shows a steady increase in account balances and income over the 20-year period. Orange backgrounds indicate hypothetical returns.

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 %		2,200,000	0			
Initial amount		200,000	1,000,000		1,000,000		2,200,000	0			
bonus %		0.00 %	0.00 %		0.00 %						
w/bonus		200,000	1,000,000		1,000,000		2,200,000				
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	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	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	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	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	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	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	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	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	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	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	2,058,709	0	34,806	34,806	end of 11
end of 12	82	80,162	0	1,159,514	0	880,911	2,120,587	0	35,571	35,571	end of 12
end of 13	83	80,170	0	1,205,894	0	898,529	2,184,594	0	36,354	36,354	end of 13
end of 14	84	80,178	0	1,254,130	0	916,499	2,250,808	0	37,154	37,154	end of 14
end of 15	85	80,186	0	1,304,295	0	934,829	2,319,311	0	37,971	37,971	end of 15
end of 16	86	80,194	0	1,356,467	0	953,526	2,390,187	0	38,807	38,807	end of 16
end of 17	87	80,202	0	1,410,726	0	972,596	2,463,524	0	39,660	39,660	end of 17
end of 18	88	80,210	0	1,467,155	0	992,048	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	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	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 backgrounds indicate hypothetical returns

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario: Viewing % Distribution

Planning Horizon: 20 years

Year	Accounts						Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income					
net return	70	0.01 %	4.00 %	IRA	2.00 %	IRA	2,200,000	0	Manage		
initial amount		200,000	1,000,000		1,000,000		2,200,000	0	Inf Factor		
bonus % w/bonus		0.00 %	0.00 %		0.00 %		2,200,000	0	2.20 %		
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	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	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	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	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	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	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	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	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	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	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	2,058,709	0	34,806	34,806	end of 11
end of 12	82	80,162	0	1,159,514	0	880,911	2,120,587	0	35,571	35,571	end of 12
end of 13	83	80,170	0	1,205,894	0	898,529	2,184,594	0	36,354	36,354	end of 13
end of 14	84	80,178	0	1,254,130	0	916,499	2,250,808	0	37,154	37,154	end of 14
end of 15	85	80,186	0	1,304,295	0	934,829	2,319,311	0	37,971	37,971	end of 15
end of 16	86	80,194	0	1,356,467	0	953,526	2,390,187	0	38,807	38,807	end of 16
end of 17	87	80,202	0	1,410,726	0	972,596	2,463,524	0	39,660	39,660	end of 17
end of 18	88	80,210	0	1,467,155	0	992,048	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	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	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 backgrounds indicate hypothetical 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 Death Benefit](#) [View % Distribution](#) [View Comparison](#) [View Tax Rates](#) [View Calendar Years](#)

Account and Income Grouping

Accounts

	Group 1	Group 2	Group 3	Group 4	Group 5
Savings/Checking	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Roth IRA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401(k)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

	Group 1	Group 2	Group 3	Group 4	Group 5
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

[Reset](#) [Condense All](#) [Uncondense All](#)

Group Setup

Accounts

Group	Title	Color
Group 1	Accounts	Set
Group 2		Set
Group 3		Set
Group 4		Set
Group 5		Set

Incomes

Group	Title	Color
Group 1	Incomes	Set
Group 2		Set
Group 3		Set
Group 4		Set
Group 5		Set

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[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 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: Viewing % Distribution

Planning Horizon: 20 years

Accounts: Savings/Checking, Roth IRA, 401(k)

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	SS	Total Income	Year	
net return	70	0.01 %	4.00 %	2.00 %			2,200,000			Manage			
initial amount		200,000	1,000,000	1,000,000			2,200,000	Subtotal of account incomes		Infl Factor			
bonus %		0.00 %	0.00 %	0.00 %			0			2.20 %			
w/bonus		200,000	1,000,000	1,000,000			2,200,000						
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 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	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	83	80,170	0	1,205,894	0	898,529	0	2,184,594	0	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
			120,000		340,000		340,000		800,000		694,016	1,494,016	

Orange backgrounds indicate hypothetical returns

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

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: Viewing % Distribution

Planning Horizon: 20 years

Accounts: Savings/Checking, Roth IRA, 401(k)

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	SS	Total Income	Year	
net return	70	0.01 %	4.00 %	2.00 %			2,200,000			Manage			
initial amount		200,000	1,000,000	1,000,000			2,200,000	Subtotal of account incomes		Infl Factor			
bonus %		0.00 %	0.00 %	0.00 %			0			2.20 %			
w/bonus		200,000	1,000,000	1,000,000			2,200,000						
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 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	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	83	80,170	0	1,205,894	0	898,529	0	2,184,594	0	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
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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 backgrounds indicate hypothetical returns

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

Column Display Options: [View RMD Checks](#) [Hide Income Riders](#) [View Death Benefit](#) [Hide % Distribution](#) [View Comparison](#) [View Tax Rates](#) [View Calendar Years](#)

Account and Income Grouping

Accounts

	Group 1	Group 2	Group 3	Group 4	Group 5
Savings/Checking	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Roth IRA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401(k)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

	Group 1	Group 2	Group 3	Group 4	Group 5
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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[Reset](#) [Condense All](#) [Uncondense All](#)

Group Setup

Accounts

Title	Color
Group 1 Accounts	 Set
Group 2	 Set
Group 3	 Set
Group 4	 Set
Group 5	 Set

Incomes

Title	Color
Group 1 Incomes	 Set
Group 2	 Set
Group 3	 Set
Group 4	 Set
Group 5	 Set

[Reset Title / 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 | 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: [Viewing % Distribution](#)

Planning Horizon: 20 years

Year	Accounts						Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income					
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initial amount		200,000	1,000,000	1,000,000	0.00 %	0.00 %	2,200,000	80,000	27,999	107,999	end of 1
bonus % w/bonus		200,000	1,000,000	1,000,000	0.00 %	0.00 %	2,200,000	80,000	28,615	108,615	end of 2
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	2,180,020	80,000	29,245	109,244	end of 3
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end of 13	83	80,170	0	1,205,894	0	898,529	2,184,594	0	37,971	37,971	end of 15
end of 14	84	80,178	0	1,254,130	0	916,499	2,250,808	0	38,807	38,807	end of 16
end of 15	85	80,186	0	1,304,295	0	934,829	2,319,311	0	39,660	39,660	end of 17
end of 16	86	80,194	0	1,356,467	0	953,526	2,390,187	0	40,533	40,533	end of 18
end of 17	87	80,202	0	1,410,726	0	972,596	2,463,524	0	41,425	41,425	end of 19
end of 18	88	80,210	0	1,467,155	0	992,048	2,539,413	0	42,336	42,336	end of 20
end of 19	89	80,218	0	1,525,841	0	1,011,889	2,617,948	0			
end of 20	90	80,226	0	1,586,874	0	1,032,127	2,699,228	0			
		120,000		340,000		340,000		800,000	694,016	1,494,016	

Orange backgrounds indicate hypothetical 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 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: Viewing % Distribution

Planning Horizon: 20 years

Year	Account	Income	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
			Account	Income	Account	Income					
net return	70	0.01 %	4.00 %	IRA	2.00 %	IRA	2,200,000	0			
initial amount		200,000	1,000,000		1,000,000		2,200,000	0			
bonus % w/bonus		0.00 %	0.00 %		0.00 %		2,200,000	0			
		200,000	1,000,000		1,000,000		2,200,000	0			
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	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	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	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	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	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	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	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	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	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	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	2,058,709	0	34,806	34,806	end of 11
end of 12	82	80,162	0	1,159,514	0	880,911	2,120,587	0	35,571	35,571	end of 12
end of 13	83	80,170	0	1,205,894	0	898,529	2,184,594	0	36,354	36,354	end of 13
end of 14	84	80,178	0	1,254,130	0	916,499	2,250,808	0	37,154	37,154	end of 14
end of 15	85	80,186	0	1,304,295	0	934,829	2,319,311	0	37,971	37,971	end of 15
end of 16	86	80,194	0	1,356,467	0	953,526	2,390,187	0	38,807	38,807	end of 16
end of 17	87	80,202	0	1,410,726	0	972,596	2,463,524	0	39,660	39,660	end of 17
end of 18	88	80,210	0	1,467,155	0	992,048	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	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	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 backgrounds indicate hypothetical 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 | 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: Viewing % Distribution

Planning Horizon: 20 years

Year	Account	Income	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
			Account	Income	Account	Income					
net return	70	0.01 %	4.00 %	IRA	2.00 %	IRA	2,200,000	0			
initial amount		200,000	1,000,000		1,000,000		2,200,000	0			
bonus % w/bonus		0.00 %	0.00 %		0.00 %		2,200,000	0			
		200,000	1,000,000		1,000,000		2,200,000	0			
end of 1	71	188,020	12,000	1,006,000	34,000	986,000	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	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	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	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	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	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	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	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	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	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	2,058,709	0	34,806	34,806	end of 11
end of 12	82	80,162	0	1,159,514	0	880,911	2,120,587	0	35,571	35,571	end of 12
end of 13	83	80,170	0	1,205,894	0	898,529	2,184,594	0	36,354	36,354	end of 13
end of 14	84	80,178	0	1,254,130	0	916,499	2,250,808	0	37,154	37,154	end of 14
end of 15	85	80,186	0	1,304,295	0	934,829	2,319,311	0	37,971	37,971	end of 15
end of 16	86	80,194	0	1,356,467	0	953,526	2,390,187	0	38,807	38,807	end of 16
end of 17	87	80,202	0	1,410,726	0	972,596	2,463,524	0	39,660	39,660	end of 17
end of 18	88	80,210	0	1,467,155	0	992,048	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	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	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 backgrounds indicate hypothetical returns

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 | 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 Viewing % Distribution

Planning Horizon 2 years

Year	Savings/Checking		Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income					
net return	0.01 %		4.00 %		2.00 %		2,200,000				
initial amount	200,000		1,000,000		1,000,000		2,200,000				
bonus %	0.00 %		0.00 %		0.00 %		0				
w/bonus	200,000		1,000,000		1,000,000		2,200,000				
end of 1	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	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	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	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	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	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	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	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	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	80,146	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	80,154	0	1,114,917	0	863,638	0	2,058,709	0	34,806	34,806	end of 11
end of 12	80,162	0	1,159,514	0	880,911	0	2,120,587	0	35,571	35,571	end of 12
end of 13	80,170	0	1,205,894	0	898,529	0	2,184,594	0	36,354	36,354	end of 13
end of 14	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14
end of 15	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15
end of 16	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16
end of 17	80,202	0	1,410,726	0	972,596	0	2,463,524	0	39,660	39,660	end of 17
end of 18	80,210	0	1,467,155	0	992,048	0	2,539,413	0	40,533	40,533	end of 18
end of 19	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	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 backgrounds indicate hypothetical 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 | 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 Viewing % Distribution

Planning Horizon 20 years

Year	Savings/Checking		Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income					
net return	0.01 %		4.00 %		2.00 %		2,200,000				
initial amount	200,000		1,000,000		1,000,000		2,200,000				
bonus %	0.00 %		0.00 %		0.00 %		0				
w/bonus	200,000		1,000,000		1,000,000		2,200,000				
end of 1	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	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	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	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	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	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	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	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	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	80,146	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	80,154	0	1,114,917	0	863,638	0	2,058,709	0	34,806	34,806	end of 11
end of 12	80,162	0	1,159,514	0	880,911	0	2,120,587	0	35,571	35,571	end of 12
end of 13	80,170	0	1,205,894	0	898,529	0	2,184,594	0	36,354	36,354	end of 13
end of 14	80,178	0	1,254,130	0	916,499	0	2,250,808	0	37,154	37,154	end of 14
end of 15	80,186	0	1,304,295	0	934,829	0	2,319,311	0	37,971	37,971	end of 15
end of 16	80,194	0	1,356,467	0	953,526	0	2,390,187	0	38,807	38,807	end of 16
end of 17	80,202	0	1,410,726	0	972,596	0	2,463,524	0	39,660	39,660	end of 17
end of 18	80,210	0	1,467,155	0	992,048	0	2,539,413	0	40,533	40,533	end of 18
end of 19	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	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 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: +1-888-449-6917 or support@planscout.com.