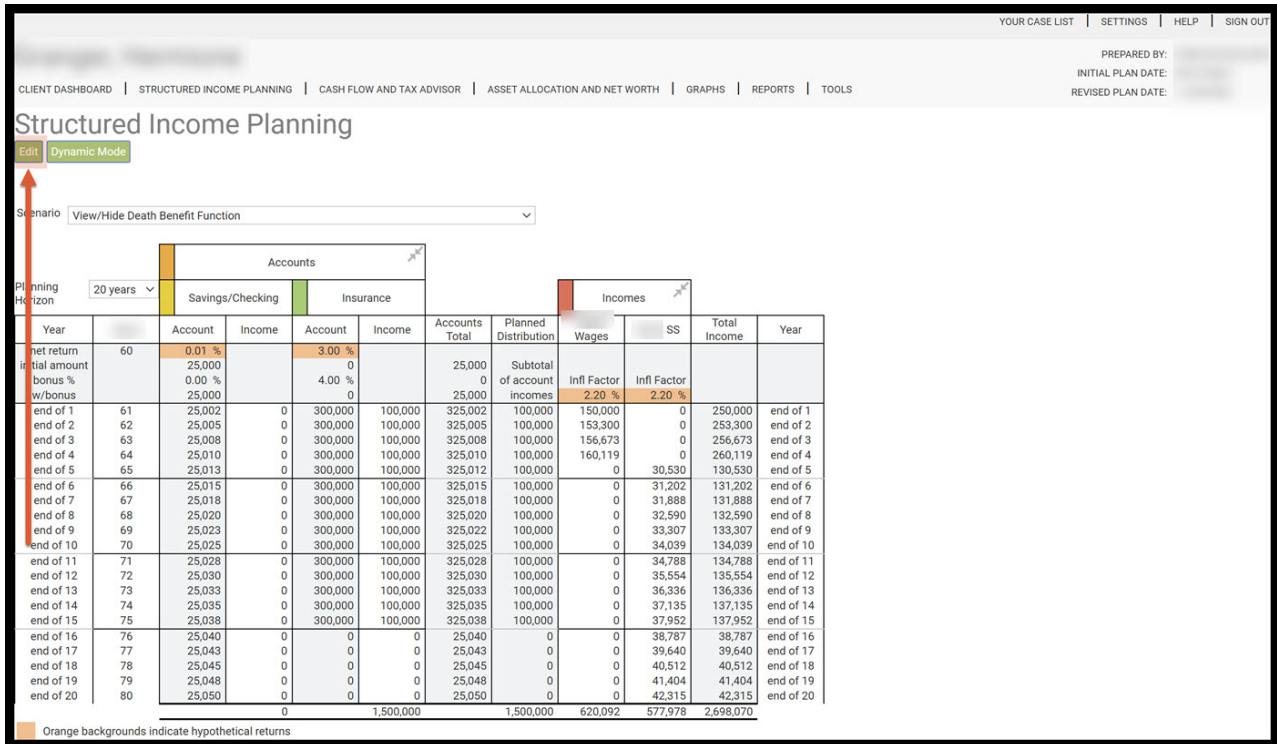


View Death Benefit Function

01/12/2026 11:17 am EST

On the structured Income planning page you can view death benefits for insurance policies. Below is a step-by-step guideline to view the death benefit for an insurance policy.

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



The screenshot displays the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these, a 'PREPARED BY:' field is visible. The main navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The 'Structured Income Planning' section is active, showing a sub-heading 'Dynamic Mode' and a green 'Edit' button, which is highlighted by a red arrow. Below the 'Edit' button is a 'Scenario' dropdown menu set to 'View/Hide Death Benefit Function'. The main table displays a 20-year planning horizon with columns for 'Year', 'Accounts', 'Incomes', and 'Total Income'. The 'Accounts' section includes 'Savings/Checking' and 'Insurance' sub-sections. The 'Incomes' section includes 'Wages' and 'SS' sub-sections. The table shows a progression from Year 60 to Year 80, with various account balances and income streams. A legend at the bottom indicates that orange backgrounds indicate hypothetical returns.

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
Initial return	60	0.01 %	3.00 %		25,000					
Initial amount		25,000		0	25,000					
bonus %		0.00 %	4.00 %							
w/bonus		25,000		0	25,000					
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	42,315	42,315	end of 20
		0			1,500,000	1,500,000	620,092	577,978	2,698,070	

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:
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: View/Hide Death Benefit Function

Planning Horizon: 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Savings/Checking	Income	Insurance	Income			Wages	SS		
net return	60	0.01 %		3.00 %						
initial amount		25,000		0	25,000	Subtotal of account incomes	Manage Infi Factor	Manage Infi Factor		
bonus % w/bonus		0.00 %		4.00 %	0		2.20 %	2.20 %		
		25,000	Manage	0	25,000					
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119
end of 5	65	25,013	0	300,000	100,000	325,013	100,000	0	30,530	130,530
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590
end of 9	69	25,023	0	300,000	100,000	325,023	100,000	0	33,307	133,307
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315
		0				1,500,000			620,092	577,978
									2,698,070	

Orange backgrounds indicate hypothetical returns

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

Column Display Options: View RMD Checks View 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: ☒ Insurance: ☒

Incomes: Group 1 Group 2 Group 3 Group 4 Group 5

Wages: ☒ SS: ☒

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	Yellow
Group 2		Orange
Group 3		Green
Group 4		Purple
Group 5		Blue

Incomes:

Group	Title	Color
Group 1	Incomes	Red
Group 2		Orange
Group 3		Green
Group 4		Purple
Group 5		Blue

Reset Title / Colors Copy Setup To All Scenarios

Return With Grouping Return Without Grouping

Step 4: Structured Income Plan: A new column called Death Benefit will appear under the Insurance column.

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 View/Hide Death Benefit Function

Planning Horizon

20 years

Accounts

Savings/Checking

Insurance

Incomes

Year		Account	Income	Account	Income	Death Benefit	Accounts Total	Death Benefit Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	0.01 %		3.00 %		0.00 %							
initial amount		25,000		0		cash value	25,000		Subtotal of account incomes	150,000	0	250,000	end of 1
bonus %		0.00 %		4.00 %		0.00 %	0			153,300	0	253,300	end of 2
w/bonus		25,000	Manage	0	Manage	1,500,000	25,000	1,525,000		156,673	0	256,673	end of 3
end of 1	61	25,002	0	300,000	100,000	1,500,000	325,002	1,525,002	100,000	160,119	0	260,119	end of 4
end of 2	62	25,005	0	300,000	100,000	1,500,000	325,005	1,525,005	100,000	0	30,530	130,530	end of 5
end of 3	63	25,008	0	300,000	100,000	1,500,000	325,008	1,525,008	100,000	0	31,202	131,202	end of 6
end of 4	64	25,010	0	300,000	100,000	1,500,000	325,010	1,525,010	100,000	0	31,888	131,888	end of 7
end of 5	65	25,013	0	300,000	100,000	1,500,000	325,012	1,525,012	100,000	0	32,590	132,590	end of 8
end of 6	66	25,015	0	300,000	100,000	1,500,000	325,015	1,525,015	100,000	0	33,307	133,307	end of 9
end of 7	67	25,018	0	300,000	100,000	1,500,000	325,018	1,525,018	100,000	0	34,039	134,039	end of 10
end of 8	68	25,020	0	300,000	100,000	1,500,000	325,020	1,525,020	100,000	0	34,788	134,788	end of 11
end of 9	69	25,023	0	300,000	100,000	1,500,000	325,022	1,525,022	100,000	0	35,554	135,554	end of 12
end of 10	70	25,025	0	300,000	100,000	1,500,000	325,025	1,525,025	100,000	0	36,336	136,336	end of 13
end of 11	71	25,028	0	300,000	100,000	1,500,000	325,028	1,525,028	100,000	0	37,135	137,135	end of 14
end of 12	72	25,030	0	300,000	100,000	1,500,000	325,030	1,525,030	100,000	0	37,952	137,952	end of 15
end of 13	73	25,033	0	300,000	100,000	1,500,000	325,033	1,525,032	100,000	0	38,787	38,787	end of 16
end of 14	74	25,035	0	300,000	100,000	1,500,000	325,035	1,525,035	100,000	0	39,640	39,640	end of 17
end of 15	75	25,038	0	300,000	100,000	1,500,000	325,038	1,525,038	100,000	0	40,512	40,512	end of 18
end of 16	76	25,040	0	0	0	0	25,040	25,040	0	0	41,404	41,404	end of 19
end of 17	77	25,043	0	0	0	0	25,043	25,043	0	0	42,315	42,315	end of 20
end of 18	78	25,045	0	0	0	0	25,045	25,045	0	0			
end of 19	79	25,048	0	0	0	0	25,048	25,048	0	0			
end of 20	80	25,050	0	0	0	0	25,050	25,050	0	0			
		0		1,500,000					1,500,000	620,092	577,978	2,698,070	

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 View/Hide Death Benefit Function

Planning Horizon20 years

Accounts

Savings/CheckingInsurance

Incomes

Year		Account	Income	Account	Income	Death Benefit	Accounts Total	Death Benefit Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	0.01 %		3.00 %		0.00 %							
initial amount		25,000		0		cash value	25,000		Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
bonus %		0.00 %		4.00 %		0.00 %	0			2.20 %	2.20 %		
w/bonus		25,000	Manage	0	Manage	1,500,000	25,000	1,525,000					
end of 1	61	25,002	0	300,000	100,000	1,500,000	325,002	1,525,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	1,500,000	325,005	1,525,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	1,500,000	325,008	1,525,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	1,500,000	325,010	1,525,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	1,500,000	325,012	1,525,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	1,500,000	325,015	1,525,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	1,500,000	325,018	1,525,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	1,500,000	325,020	1,525,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	1,500,000	325,022	1,525,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	1,500,000	325,025	1,525,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	1,500,000	325,028	1,525,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	1,500,000	325,030	1,525,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	1,500,000	325,033	1,525,032	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	1,500,000	325,035	1,525,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	1,500,000	325,038	1,525,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	0	25,040	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	0	25,043	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	0	25,045	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	0	25,048	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	0	25,050	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000					1,500,000	620,092	577,978	2,698,070	

Orange backgrounds indicate hypothetical returns

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

Column Display Options
View RMD Checks
View Income Riders
Hide 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

☒
☐
☐
☐
☐

Incomes

☒
☐
☐
☐
☐

☒
☐
☐
☐
☐

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 Plan: The Death Benefit will be removed from the Insurance Column.

YOUR CASE LIST
SETTINGS
HELP
SIGN OUT

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

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

Scenario View/Hide Death Benefit Function

Planning Horizon 20 years

Accounts

Savings/Checking

Insurance

Incomes

Wages

SS

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	0.01 %		3.00 %							
initial amount	25,000		0		25,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
bonus % w/bonus	0.00 %		4.00 %		0		2.20 %	2.20 %		
end of 1	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
	0		1,500,000			1,500,000	620,092	577,978	2,698,070	

Orange backgrounds indicate hypothetical returns

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

Structured Income Planning

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

Scenario: View/Hide Death Benefit Function

Planning Horizon: 20 years

		Accounts				Incomes					
		Savings/Checking		Insurance		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
initial amount		25,000		0		0					
bonus %		0.00 %		4.00 %		25,000					
w/bonus		25,000	Manage	0	Manage	25,000		2.20 %	2.20 %		
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000		1,500,000		620,092	577,978	2,698,070	

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

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

Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario: View/Hide Death Benefit Function

Planning Horizon: 20 years

		Accounts				Incomes					
		Savings/Checking		Insurance		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Infl Factor	Infl Factor		
initial amount		25,000		0		0					
bonus %		0.00 %		4.00 %		25,000					
w/bonus		25,000		0		25,000		2.20 %	2.20 %		
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000		1,500,000		620,092	577,978	2,698,070	

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.

The screenshot shows the 'Structured Income Planning' interface. At the top, there is a navigation bar with 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 links for YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below the navigation bar, the title 'Structured Income Planning' is displayed. Underneath the title, there is a row of buttons: Edit, Save, Cancel, Add Account, Add Income, Add Inc Tax, Add Target, Edit or Add Scenario, and Display Options. The 'Cancel' button is highlighted with a red arrow. Below the buttons, there is a 'Scenario' dropdown menu set to 'View/Hide Death Benefit Function'. The main area contains a table with columns for Year, Account, Income, Accounts Total, Planned Distribution, Wages, SS, Total Income, and Year. The table shows data for years 60 through 80. The 'Cancel' button is highlighted with a red arrow.

Step 11: Logout: To log out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

The screenshot shows the 'Structured Income Planning' interface. At the top, there is a navigation bar with 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 links for YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below the navigation bar, the title 'Structured Income Planning' is displayed. Underneath the title, there is a row of buttons: Edit, Dynamic Mode, Add Account, Add Income, Add Inc Tax, Add Target, Edit or Add Scenario, and Display Options. The 'Dynamic Mode' button is highlighted with a red arrow. Below the buttons, there is a 'Scenario' dropdown menu set to 'View/Hide Death Benefit Function'. The main area contains a table with columns for Year, Account, Income, Accounts Total, Planned Distribution, Wages, SS, Total Income, and Year. The table shows data for years 60 through 80. The 'SIGN OUT' button is highlighted with a red arrow.

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.

