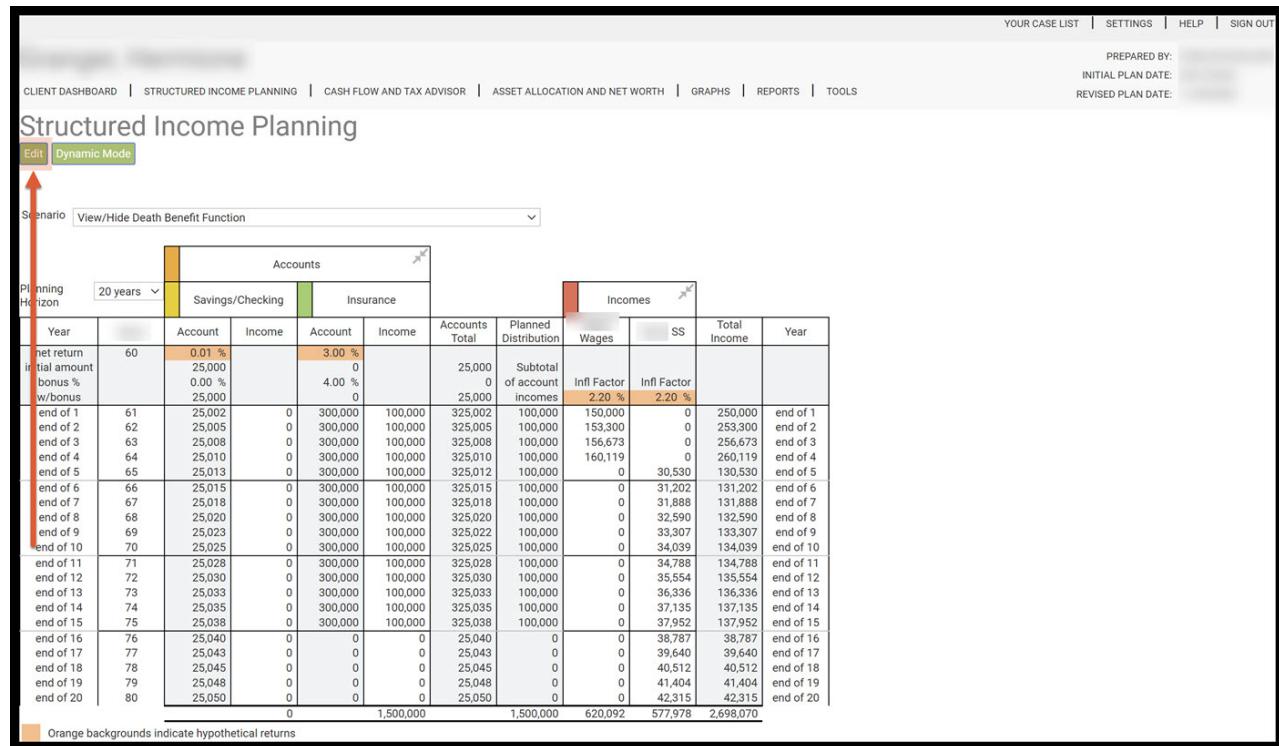


# View Death Benefit Function

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 shows the 'Structured Income Planning' section of a software 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', and 'TOOLS'. On the right, there are buttons for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. Below these, the sub-heading 'Structured Income Planning' is displayed with 'Edit' and 'Dynamic Mode' buttons. An orange arrow points to the 'Edit' button. The main area is a table titled 'Accounts' and 'Incomes'. The 'Accounts' section has columns for 'Year', 'Planning Horizon' (set to '20 years'), 'Account', 'Income', 'Account', and 'Income'. The 'Incomes' section has columns for 'Planned Distribution', 'Wages', 'SS', 'Total Income', and 'Year'. The table contains data for years 60 to 80, showing various account and income values, including some orange-highlighted cells representing hypothetical returns. A legend at the bottom left indicates that 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

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

Color

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

Accounts												Incomes		
Planning Horizon	20 years	Savings/Checking			Insurance			Accounts Total	Death Benefit Total	Planned Distribution	Wages	SS	Total Income	Year
Year		Account	Income	Account	Income	Death Benefit								
net return	60	0.01 %		3.00 %		0.00 %	cash value	25,000	0	Subtotal of account incomes	Manage	Manage		
initial amount		25,000		0		0.00 %		0		Infl Factor	Infl Factor			
bonus % w/bonus		0.00 %		4.00 %		0.00 %		0		2.20 %	2.20 %			
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 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

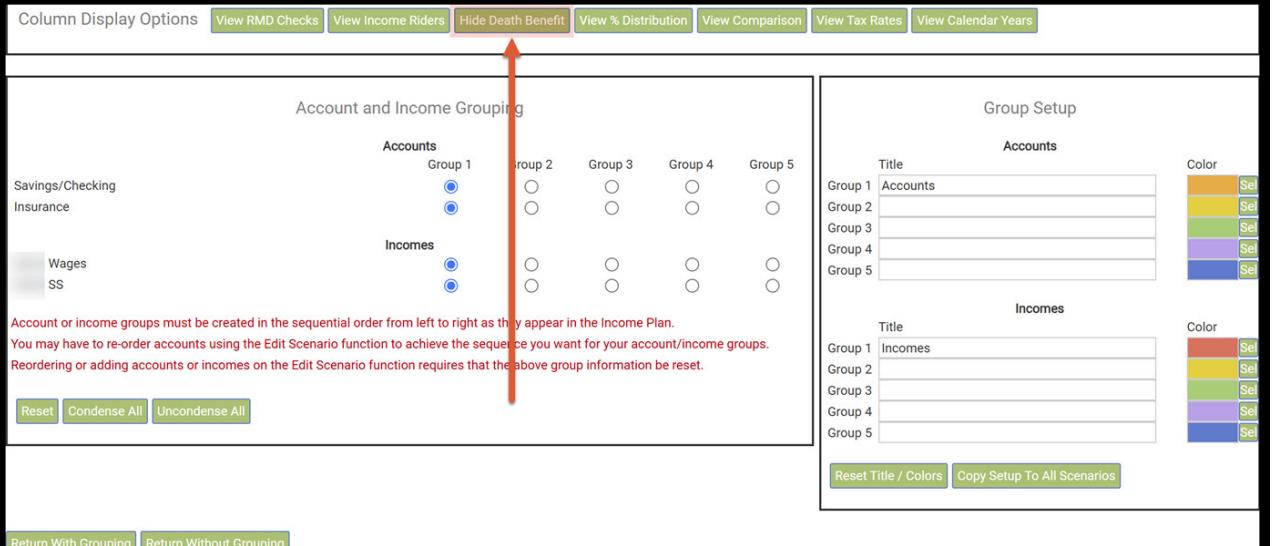
Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario View/Hide Death Benefit Function

Accounts												Incomes		
Planning Horizon	20 years	Savings/Checking			Insurance			Accounts Total	Death Benefit Total	Planned Distribution	Wages	SS	Total Income	Year
Year		Account	Income	Account	Income	Death Benefit								
net return	60	0.01 %		3.00 %		0.00 %	cash value	25,000	0	Subtotal of account incomes	Manage	Manage		
initial amount		25,000		0		0.00 %		0		Infl Factor	Infl Factor			
bonus % w/bonus		0.00 %		4.00 %		0.00 %		0		2.20 %	2.20 %			
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
Savings/Checking	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance	<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
Wages	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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

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

Color

<input checked="" type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel

Incomes

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

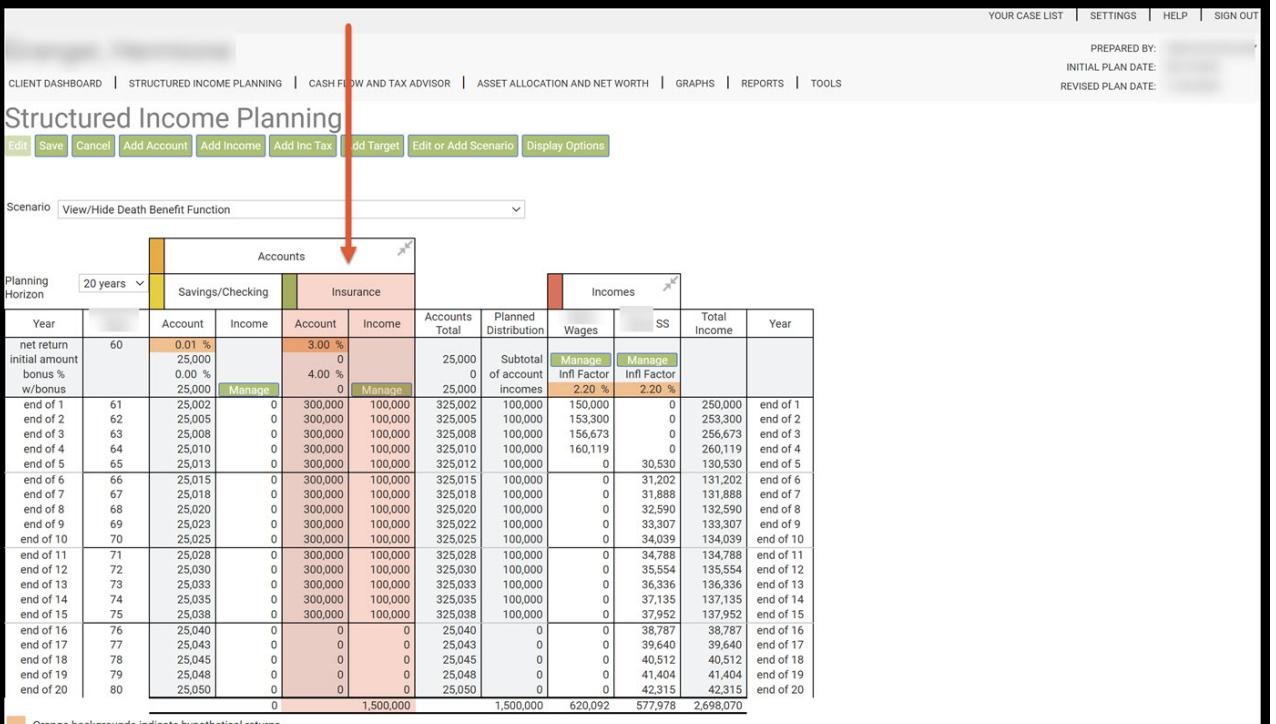
Color

<input checked="" type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel
<input type="radio"/>	Sel

[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.



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

PREPARED BY: [YOUR CASE LIST](#) | [SETTINGS](#) | [HELP](#) | [SIGN OUT](#)

INITIAL PLAN DATE: [REVISIED 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		Incomes		Total Income	Year
	Account	Income	Account	Income		
net return	0.01 %		3.00 %			
initial amount	25,000	0	0	25,000	Subtotal of account incomes	
bonus % w/bonus	0.00 %	4.00 %	0	25,000	<a href="#">Manage</a> Infl Factor 2.20 %	
	25,000	0	0	25,000	<a href="#">Manage</a> Infl Factor 2.20 %	
end of 1	25,002	0	300,000	100,000	325,002	250,000 end of 1
end of 2	25,005	0	300,000	100,000	325,005	253,300 end of 2
end of 3	25,008	0	300,000	100,000	325,008	256,673 end of 3
end of 4	25,010	0	300,000	100,000	325,010	260,119 end of 4
end of 5	25,013	0	300,000	100,000	325,012	260,530 end of 5
end of 6	25,015	0	300,000	100,000	325,015	261,202 end of 6
end of 7	25,018	0	300,000	100,000	325,018	261,888 end of 7
end of 8	25,020	0	300,000	100,000	325,020	262,590 end of 8
end of 9	25,023	0	300,000	100,000	325,022	263,307 end of 9
end of 10	25,025	0	300,000	100,000	325,025	264,039 end of 10
end of 11	25,028	0	300,000	100,000	325,028	264,788 end of 11
end of 12	25,030	0	300,000	100,000	325,030	265,554 end of 12
end of 13	25,033	0	300,000	100,000	325,033	266,336 end of 13
end of 14	25,035	0	300,000	100,000	325,035	267,135 end of 14
end of 15	25,038	0	300,000	100,000	325,038	267,952 end of 15
end of 16	25,040	0	0	0	25,040	268,787 end of 16
end of 17	25,043	0	0	0	25,043	269,640 end of 17
end of 18	25,045	0	0	0	25,045	270,512 end of 18
end of 19	25,048	0	0	0	25,048	271,404 end of 19
end of 20	25,050	0	0	0	25,050	272,315 end of 20
	0	1,500,000	0	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:  
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				Incomes					
Planning Horizon	Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	0.01 %	3.00 %	0	4.00 %	25,000	Subtotal of account incomes	150,000	0	250,000	
initial amount		25,000		0		0	Infl Factor	153,300	0	253,300	end of 1
bonus % w/bonus		0.00 %		4.00 %		25,000	Infl Factor	156,673	0	256,673	end of 2
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	160,119	0	260,119	end of 3
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	160,119	0	260,119	end of 4
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	160,119	0	260,119	end of 5
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 6
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	160,119	0	260,119	end of 7
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	160,119	0	260,119	end of 8
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	160,119	0	260,119	end of 9
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	160,119	0	260,119	end of 10
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	160,119	0	260,119	end of 11
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	160,119	0	260,119	end of 12
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	160,119	0	260,119	end of 13
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	160,119	0	260,119	end of 14
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	160,119	0	260,119	end of 15
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	160,119	0	260,119	end of 16
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	160,119	0	260,119	end of 17
end of 16	76	25,040	0	0	0	25,040	0	0	0	38,787	end of 18
end of 17	77	25,043	0	0	0	25,043	0	0	0	39,640	end of 19
end of 18	78	25,045	0	0	0	25,045	0	0	0	40,512	end of 20
end of 19	79	25,048	0	0	0	25,048	0	0	0	41,404	
end of 20	80	25,050	0	0	0	25,050	0	0	0	42,315	
		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:  
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

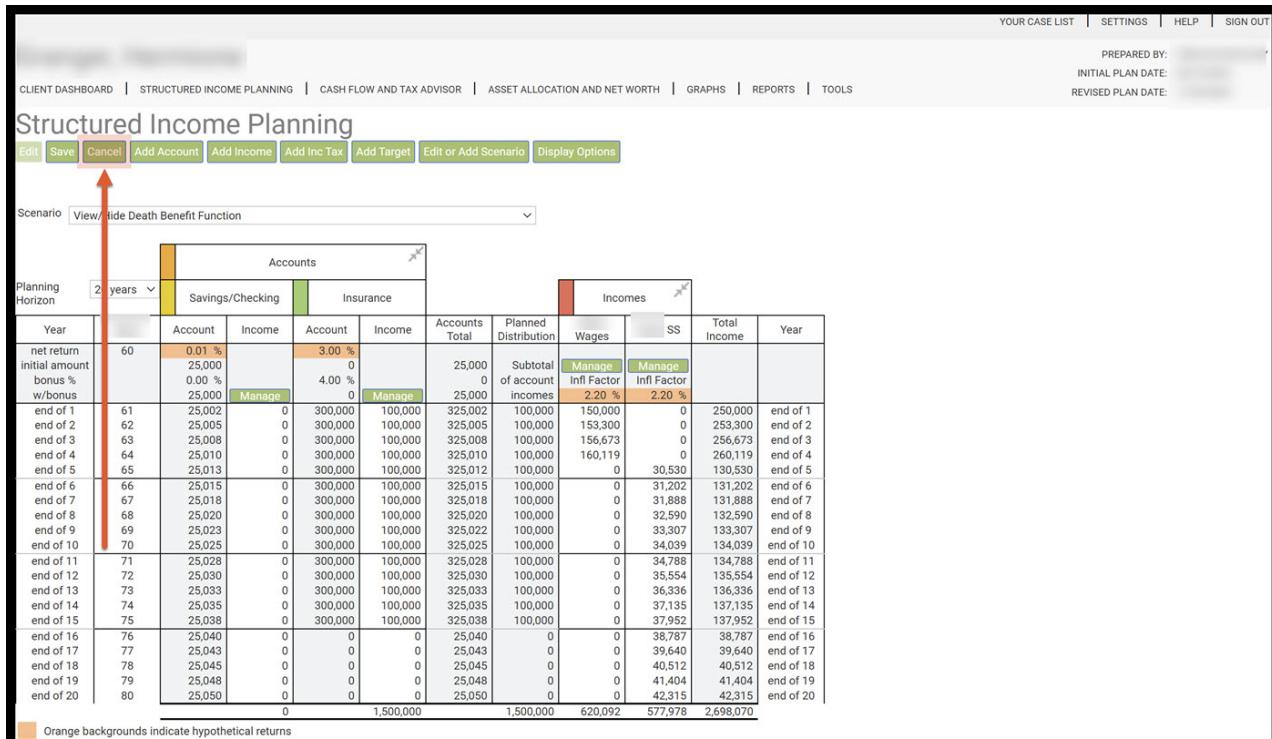
Scenario: View/Hide Death Benefit Function

Planning Horizon: 20 years

		Accounts				Incomes					
Planning Horizon	Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	0.01 %	3.00 %	0	4.00 %	25,000	Subtotal of account incomes	150,000	0	250,000	
initial amount		25,000		0		0	Infl Factor	153,300	0	253,300	end of 1
bonus % w/bonus		0.00 %		4.00 %		25,000	Infl Factor	156,673	0	256,673	end of 2
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	160,119	0	260,119	end of 3
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	160,119	0	260,119	end of 4
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	160,119	0	260,119	end of 5
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 6
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	160,119	0	260,119	end of 7
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	160,119	0	260,119	end of 8
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	160,119	0	260,119	end of 9
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	160,119	0	260,119	end of 10
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	160,119	0	260,119	end of 11
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	160,119	0	260,119	end of 12
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	160,119	0	260,119	end of 13
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	160,119	0	260,119	end of 14
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	160,119	0	260,119	end of 15
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	160,119	0	260,119	end of 16
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	160,119	0	260,119	end of 17
end of 16	76	25,040	0	0	0	25,040	0	0	0	38,787	end of 18
end of 17	77	25,043	0	0	0	25,043	0	0	0	39,640	end of 19
end of 18	78	25,045	0	0	0	25,045	0	0	0	40,512	end of 20
end of 19	79	25,048	0	0	0	25,048	0	0	0	41,404	
end of 20	80	25,050	0	0	0	25,050	0	0	0	42,315	
		0	1,500,000	1,500,000	620,092	577,978	2,698,070				

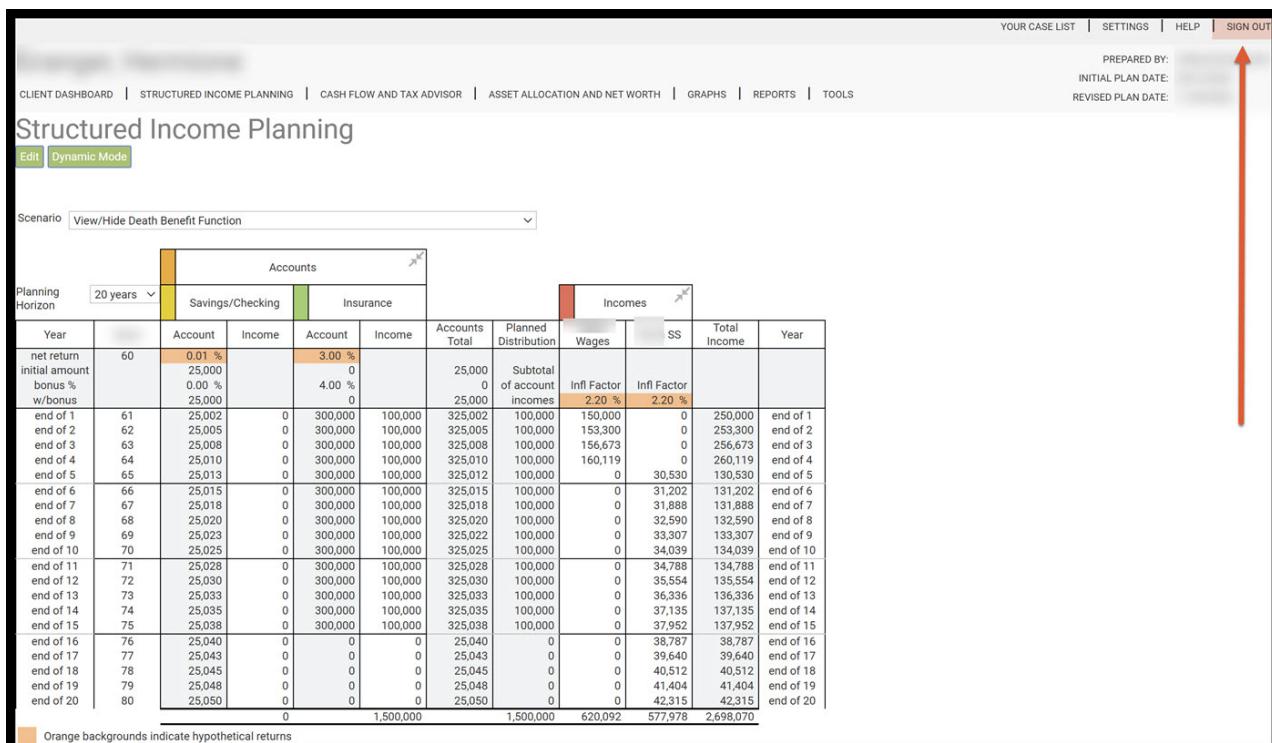
Orange backgrounds indicate hypothetical returns

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' page. At the top, there are several 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. The main area is a table titled 'Accounts' and 'Incomes'. The table has columns for Year, Account, Income, Accounts Total, Planned Distribution, Wages, SS, Total Income, and Year. The table spans from year 60 to 80. Rows are color-coded: orange for years 60-65, white for 66-70, orange for 71-75, white for 76-80. A legend at the bottom left indicates that orange backgrounds indicate hypothetical returns.

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' page. At the top, there are several buttons: 'Edit', 'Dynamic Mode', 'Save', 'Cancel', 'Add Account', 'Add Income', 'Add Inc Tax', 'Add Target', 'Edit or Add Scenario', and 'Display Options'. The 'SIGN OUT' button is highlighted with a red arrow. The main area is a table titled 'Accounts' and 'Incomes', identical to the one in the previous screenshot. The table spans from year 60 to 80, with the same color-coding (orange for 60-65, white for 66-70, orange for 71-75, white for 76-80). A legend at the bottom left indicates that 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](mailto:support@planscout.com).

