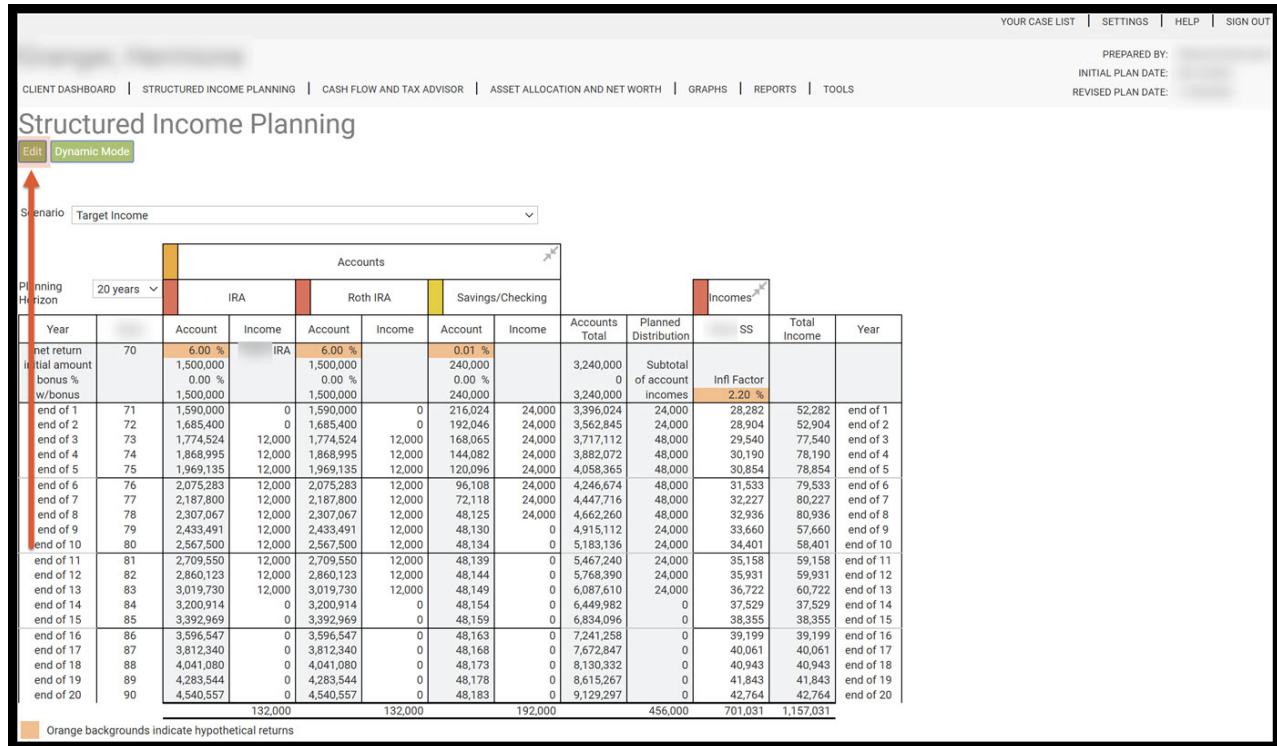


Creating a Target Income in the Structured Income Plan

01/12/2026 11:06 am EST

On the Structured Income Planning Page, you can create a column that will display the target income. Below is a step-by-step guideline for creating a target income column.

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



The screenshot shows the 'Structured Income Planning' page. At the top, there are navigation links: 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the header, it says 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main title 'Structured Income Planning' is centered above a table. The table has a header row with columns for 'Year', 'Account', 'Income', 'Account', 'Income', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'SS', 'Total Income', and 'Year'. The 'Edit' button is highlighted with a red arrow. The table data shows a planning horizon of 20 years, with columns for IRA, Roth IRA, and Savings/Checking. The 'Incomes' column is empty. A note at the bottom left says 'Orange backgrounds indicate hypothetical returns'.

Step 2: Add Target: Click on the green Add Target 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 Target Income

Planning Horizon 20 years

Accounts											
IRA		Roth IRA		Savings/Checking		Incomes					
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	6.00 %	IRA	6.00 %	0.01 %							
initial amount	1,500,000		1,500,000	240,000			3,240,000	Subtotal of account incomes	Manage		
bonus % w/bonus	0.00 %		0.00 %	0.00 %			0	Infl Factor	Manage		
	1,500,000	Manage	1,500,000	240,000	Manage		3,240,000	2.20 %	Infl Factor		
end of 1	71	1,590,000	0	1,590,000	0	216,024	24,000	3,396,024	24,000	28,282	end of 1
end of 2	72	1,685,400	0	1,685,400	0	192,046	24,000	3,562,845	24,000	28,904	end of 2
end of 3	73	1,774,524	12,000	1,774,524	12,000	168,065	24,000	3,717,112	48,000	29,540	end of 3
end of 4	74	1,868,995	12,000	1,868,995	12,000	144,082	24,000	3,882,072	48,000	30,190	end of 4
end of 5	75	1,969,135	12,000	1,969,135	12,000	120,096	24,000	4,058,365	48,000	30,854	end of 5
end of 6	76	2,075,283	12,000	2,075,283	12,000	96,108	24,000	4,246,674	48,000	31,533	end of 6
end of 7	77	2,187,800	12,000	2,187,800	12,000	72,118	24,000	4,447,716	48,000	32,227	end of 7
end of 8	78	2,307,067	12,000	2,307,067	12,000	48,125	24,000	4,662,260	48,000	32,936	end of 8
end of 9	79	2,433,491	12,000	2,433,491	12,000	48,130	0	4,915,112	24,000	33,660	end of 9
end of 10	80	2,567,500	12,000	2,567,500	12,000	48,134	0	5,183,136	24,000	34,401	end of 10
end of 11	81	2,709,550	12,000	2,709,550	12,000	48,139	0	5,467,240	24,000	35,158	end of 11
end of 12	82	2,860,123	12,000	2,860,123	12,000	48,144	0	5,768,390	24,000	35,931	end of 12
end of 13	83	3,019,730	12,000	3,019,730	12,000	48,149	0	6,087,610	24,000	36,722	end of 13
end of 14	84	3,200,914	0	3,200,914	0	48,154	0	6,449,982	0	37,529	end of 14
end of 15	85	3,392,969	0	3,392,969	0	48,159	0	6,834,096	0	38,355	end of 15
end of 16	86	3,596,547	0	3,596,547	0	48,163	0	7,241,258	0	39,199	end of 16
end of 17	87	3,812,340	0	3,812,340	0	48,168	0	7,672,847	0	40,061	end of 17
end of 18	88	4,041,080	0	4,041,080	0	48,173	0	8,130,332	0	40,943	end of 18
end of 19	89	4,283,544	0	4,283,544	0	48,178	0	8,615,267	0	41,843	end of 19
end of 20	90	4,540,557	0	4,540,557	0	48,183	0	9,129,297	0	42,764	end of 20
		132,000		132,000		192,000		456,000		701,031	1,157,031

Orange backgrounds indicate hypothetical returns

Step 3: Target Name: Enter in Target Name.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Target

Save Cancel

Target name Target Income

First year target income

Inflation rate 0.0 %

Target description

Limit inflation in old age

Age for limit 0 Client 1 age Client 2 age

Target Adjustments

Add Adjustment

Pick year(s)

Pick year(s) to remove

Reset all years

Year Target adjustment

1

2

3

4

5

6

7

8

9

10

11

12

13

14

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22

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24

Note that entered values WILL roll down to following years when blank

Orange backgrounds indicate hypothetical returns

Step 4: First Year Target Income: Enter in the numeric value for the first year. SIPS recognizes the dollar mark and commas.

Manage Target

Save | Cancel

Target name	Retirement Income
First year target income	100,000
Inflation rate	0.0 %
Target description	<input type="text"/>
Limit inflation in old age	<input type="checkbox"/>
Age for limit	<input type="text"/> 0 <input type="radio"/> Client 1 age <input type="radio"/> Client 2 age

Target Adjustments

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Year Target adjustment

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

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

Step 5: Inflation rate: Enter in the percentage amount.

Manage Target

Save | Cancel

Target name	Retirement Income
First year target income	50,000
Inflation rate	2.0 %
Target description	<input type="text"/>
Limit inflation in old age	<input type="checkbox"/>
Age for limit	<input type="text"/> 0 <input type="radio"/> Client 1 age <input type="radio"/> Client 2 age

Target Adjustments

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Year Target adjustment

Year	Target adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
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22	
23	
24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

Step 6: Target Description: Enter in a description.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Target

Save | Cancel

Target name	Retirement Income
First year target income	50,000
Inflation rate	2.2 %
Target description	Retirement Income
Limit inflation in old age	<input type="checkbox"/>
Age for limit	0 <input type="radio"/> Client 1 age <input type="radio"/> Client 2 age

ADD ADJUSTMENT

Target Adjustments

Pick year(s)

Pick year(s) to remove

Reset all years

Year Target adjustment

1

2

3

4

5

6

7

8

9

10

11

12

13

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24

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Target

Save | Cancel

Target name

First year target income

Inflation rate

Target description

Retirement Income

Limit inflation in old age

Age for limit

ADD ADJUSTMENT

Target Adjustments

Pick year(s)

Pick year(s) to remove

Reset all years

Year Target adjustment

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

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23

24

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

Step 8: Structured Income Plan: Two new columns have appeared in the structured income plan: the target income and the income gap.

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 | Target Income

Planning Horizon: 20 years

Accounts										Incomes			
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Income Gap	Year
net return	6.00 %	IRA	6.00 %	Roth IRA	0.01 %								
initial amount	1,500,000		1,500,000		240,000		3,240,000	Subtotal of account incomes	24,000	28,282	52,282	50,000	2,282
bonus % w/bonus	0.00 %		0.00 %		0.00 %		0	Infl Factor		50,000	52,282	52,224	52,224
	1,500,000	Manage	1,500,000	Manage	240,000	Manage	3,240,000	2.20 %		50,000	52,282	52,224	52,224
end of 1	71	1,590,000	0	1,590,000	0	216,024	24,000	3,396,024	24,000	28,282	52,282	50,000	2,282
end of 2	72	1,685,400	0	1,685,400	0	192,046	24,000	3,562,845	24,000	28,904	52,904	51,100	1,804
end of 3	73	1,774,524	12,000	1,774,524	12,000	168,065	24,000	3,717,112	48,000	29,540	77,540	52,224	25,316
end of 4	74	1,868,995	12,000	1,868,995	12,000	144,082	24,000	3,882,072	48,000	30,190	78,190	53,373	24,817
end of 5	75	1,969,135	12,000	1,969,135	12,000	120,096	24,000	4,058,365	48,000	30,854	78,854	54,547	24,307
end of 6	76	2,075,283	12,000	2,075,283	12,000	96,108	24,000	4,246,674	48,000	31,533	79,533	55,747	23,786
end of 7	77	2,187,800	12,000	2,187,800	12,000	72,118	24,000	4,447,716	48,000	32,227	80,227	56,974	23,253
end of 8	78	2,307,067	12,000	2,307,067	12,000	48,125	24,000	4,662,260	48,000	32,936	80,936	58,227	22,708
end of 9	79	2,433,491	12,000	2,433,491	12,000	48,130	0	4,915,112	24,000	33,660	57,660	59,508	(1,848)
end of 10	80	2,567,500	12,000	2,567,500	12,000	48,134	0	5,183,136	24,000	34,401	58,401	60,817	(2,417)
end of 11	81	2,709,550	12,000	2,709,550	12,000	48,139	0	5,467,240	24,000	35,158	59,158	62,155	(2,998)
end of 12	82	2,860,123	12,000	2,860,123	12,000	48,144	0	5,768,390	24,000	35,931	59,931	63,523	(3,592)
end of 13	83	3,019,730	12,000	3,019,730	12,000	48,149	0	6,087,610	24,000	36,722	60,722	64,920	(4,199)
end of 14	84	3,200,914	0	3,200,914	0	48,154	0	6,449,982	0	37,529	37,529	66,349	(28,819)
end of 15	85	3,392,969	0	3,392,969	0	48,159	0	6,834,096	0	38,355	38,355	67,808	(29,453)
end of 16	86	3,596,547	0	3,596,547	0	48,163	0	7,241,258	0	39,199	39,199	69,300	(30,101)
end of 17	87	3,812,340	0	3,812,340	0	48,168	0	7,672,847	0	40,061	40,061	70,825	(30,763)
end of 18	88	4,041,080	0	4,041,080	0	48,173	0	8,130,332	0	40,943	40,943	72,383	(31,440)
end of 19	89	4,283,544	0	4,283,544	0	48,178	0	8,615,267	0	41,843	41,843	73,975	(32,132)
end of 20	90	4,540,557	0	4,540,557	0	48,183	0	9,129,297	0	42,764	42,764	75,603	(32,839)
		132,000		132,000		192,000		456,000		701,031	1,157,031	1,239,359	(82,328)

Orange backgrounds indicate hypothetical returns

Step 9: Income gap: If the numbers are in green the total amount exceed the target income. If the numbers are in red the total numbers are below the target income.

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

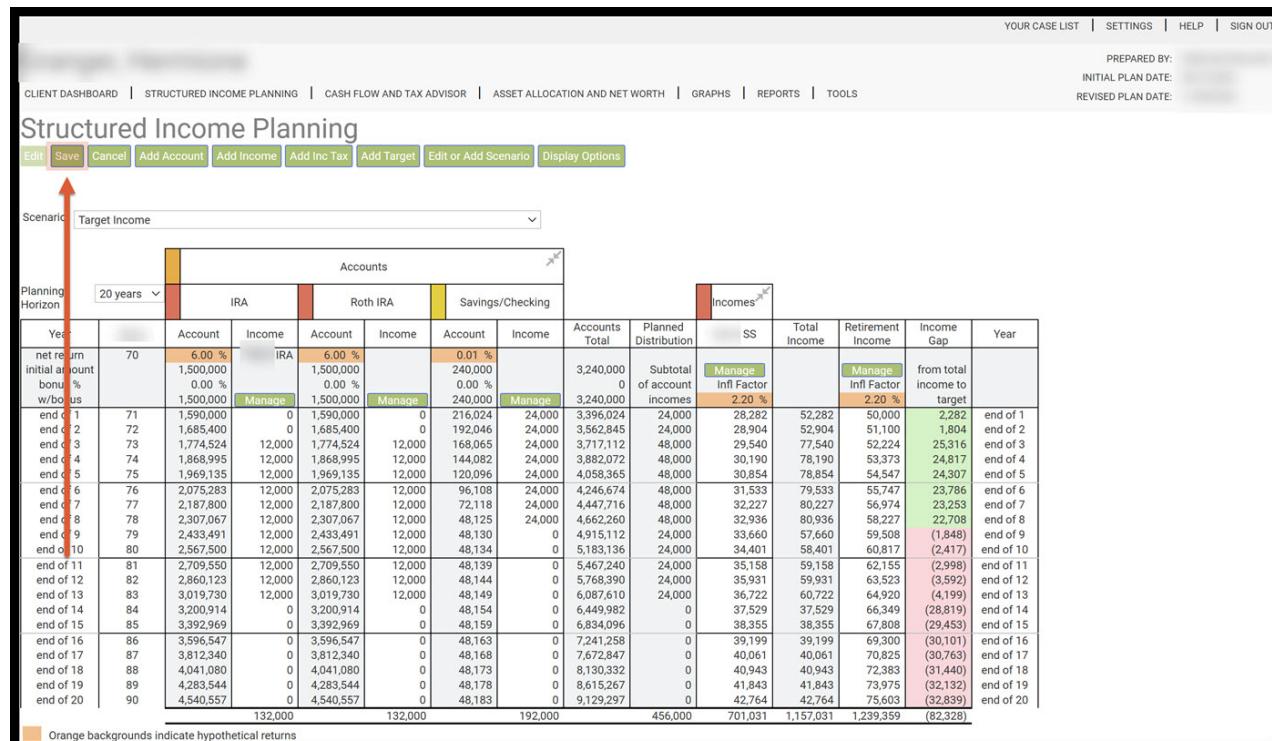
Scenario | Target Income

Planning Horizon: 20 years

Accounts										Incomes			
Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Income Gap	Year
net return	6.00 %	IRA	6.00 %	Roth IRA	0.01 %								
initial amount	1,500,000		1,500,000		240,000		3,240,000	Subtotal of account incomes	24,000	28,282	52,282	50,000	2,282
bonus % w/bonus	0.00 %		0.00 %		0.00 %		0	Infl Factor		50,000	52,282	52,224	52,224
	1,500,000	Manage	1,500,000	Manage	240,000	Manage	3,240,000	2.20 %		50,000	52,282	52,224	52,224
end of 1	71	1,590,000	0	1,590,000	0	216,024	24,000	3,396,024	24,000	28,282	52,282	50,000	2,282
end of 2	72	1,685,400	0	1,685,400	0	192,046	24,000	3,562,845	24,000	28,904	52,904	51,100	1,804
end of 3	73	1,774,524	12,000	1,774,524	12,000	168,065	24,000	3,717,112	48,000	29,540	77,540	52,224	25,316
end of 4	74	1,868,995	12,000	1,868,995	12,000	144,082	24,000	3,882,072	48,000	30,190	78,190	53,373	24,817
end of 5	75	1,969,135	12,000	1,969,135	12,000	120,096	24,000	4,058,365	48,000	30,854	78,854	54,547	24,307
end of 6	76	2,075,283	12,000	2,075,283	12,000	96,108	24,000	4,246,674	48,000	31,533	79,533	55,747	23,786
end of 7	77	2,187,800	12,000	2,187,800	12,000	72,118	24,000	4,447,716	48,000	32,227	80,227	56,974	23,253
end of 8	78	2,307,067	12,000	2,307,067	12,000	48,125	24,000	4,662,260	48,000	32,936	80,936	58,227	22,708
end of 9	79	2,433,491	12,000	2,433,491	12,000	48,130	0	4,915,112	24,000	33,660	57,660	59,508	(1,848)
end of 10	80	2,567,500	12,000	2,567,500	12,000	48,134	0	5,183,136	24,000	34,401	58,401	60,817	(2,417)
end of 11	81	2,709,550	12,000	2,709,550	12,000	48,139	0	5,467,240	24,000	35,158	59,158	62,155	(2,998)
end of 12	82	2,860,123	12,000	2,860,123	12,000	48,144	0	5,768,390	24,000	35,931	59,931	63,523	(3,592)
end of 13	83	3,019,730	12,000	3,019,730	12,000	48,149	0	6,087,610	24,000	36,722	60,722	64,920	(4,199)
end of 14	84	3,200,914	0	3,200,914	0	48,154	0	6,449,982	0	37,529	37,529	66,349	(28,819)
end of 15	85	3,392,969	0	3,392,969	0	48,159	0	6,834,096	0	38,355	38,355	67,808	(29,453)
end of 16	86	3,596,547	0	3,596,547	0	48,163	0	7,241,258	0	39,199	39,199	69,300	(30,101)
end of 17	87	3,812,340	0	3,812,340	0	48,168	0	7,672,847	0	40,061	40,061	70,825	(30,763)
end of 18	88	4,041,080	0	4,041,080	0	48,173	0	8,130,332	0	40,943	40,943	72,383	(31,440)
end of 19	89	4,283,544	0	4,283,544	0	48,178	0	8,615,267	0	41,843	41,843	73,975	(32,132)
end of 20	90	4,540,557	0	4,540,557	0	48,183	0	9,129,297	0	42,764	42,764	75,603	(32,839)
		132,000		132,000		192,000		456,000		701,031	1,157,031	1,239,359	(82,328)

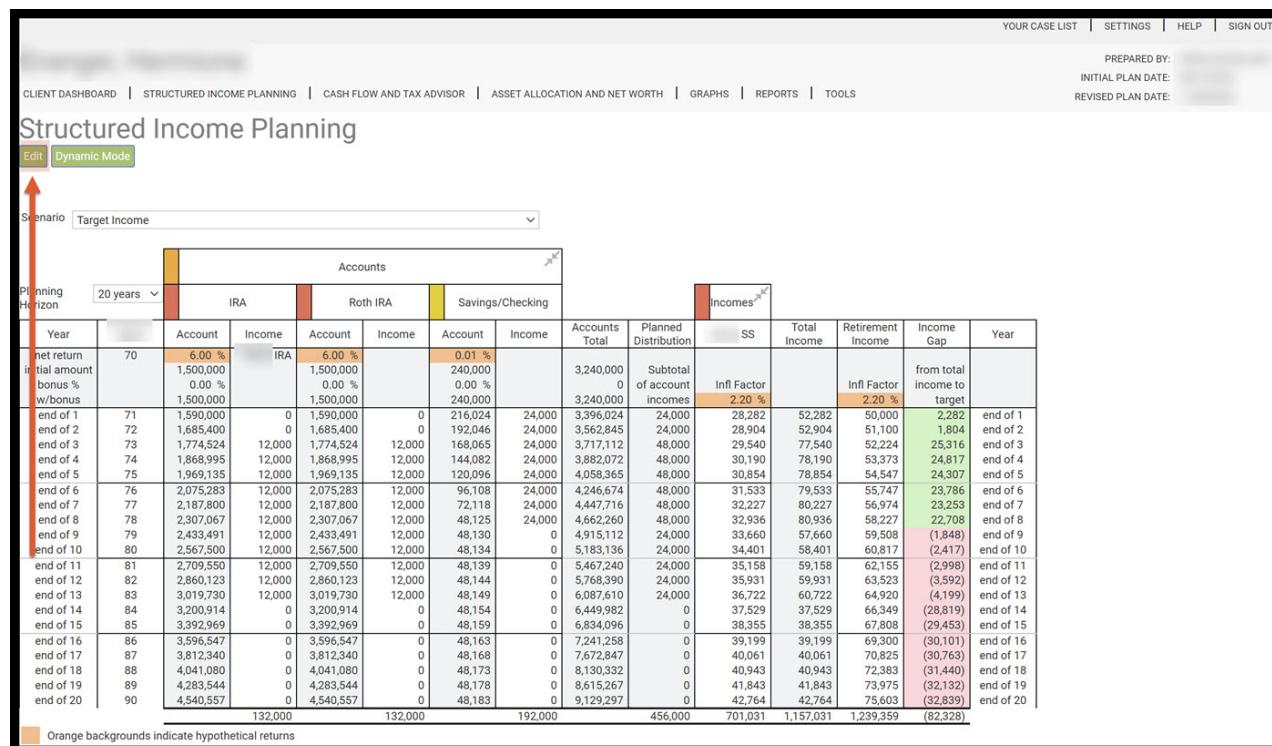
Orange backgrounds indicate hypothetical returns

Step 10: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



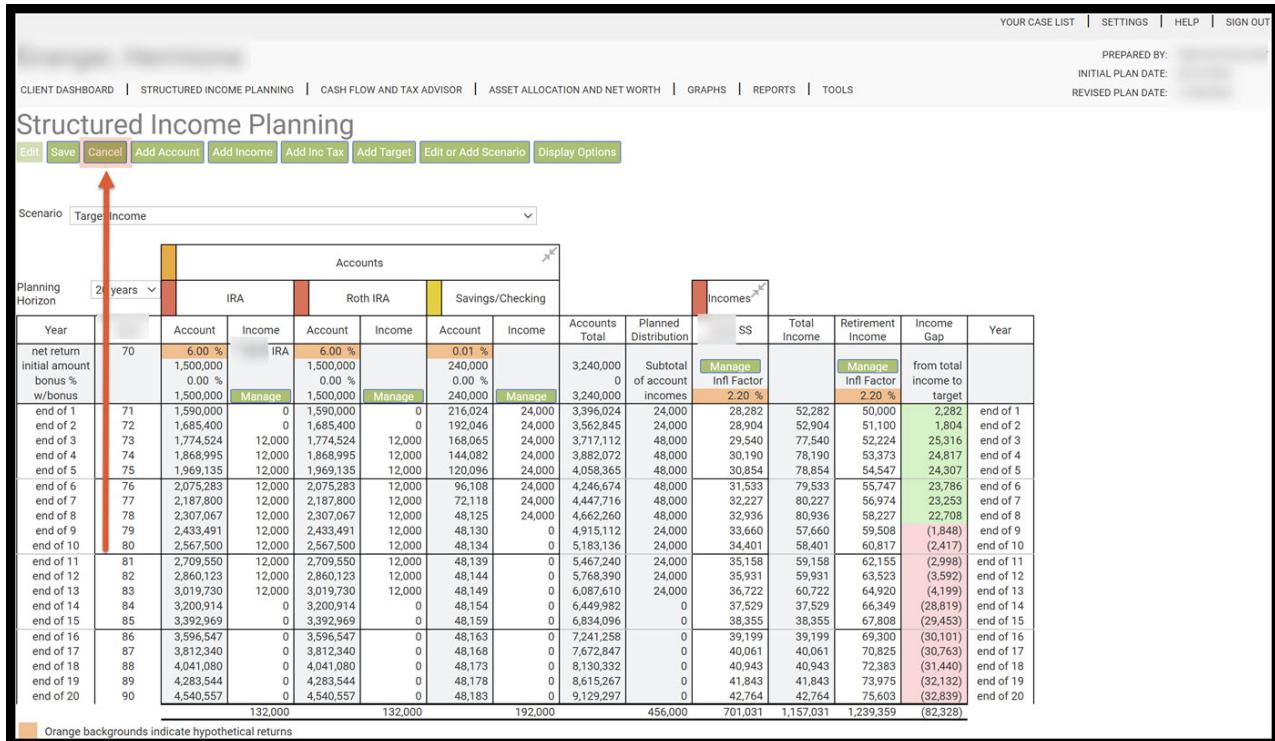
The screenshot shows the 'Structured Income Planning' section of the software. At the top, there are several buttons: 'Edit', 'Save' (highlighted with a red arrow), 'Cancel', 'Add Account', 'Add Income', 'Add Inc Tax', 'Add Target', 'Edit or Add Scenario', and 'Display Options'. The 'Save' button is green with white text. The main area is a table titled 'Accounts' with columns for 'Year', 'Planning Horizon', 'Account', 'Income', 'Account', 'Income', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'SS', 'Total Income', 'Retirement Income', 'Income Gap', and 'Year'. The table data spans from year 70 to 90, showing projected financials for an IRA, Roth IRA, and Savings/Checking accounts. The background of the table cells for years 70-90 is orange, indicating hypothetical returns. The top right of the interface shows 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these are 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'.

Step 11: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



The screenshot shows the 'Structured Income Planning' section of the software. At the top, there are two buttons: 'Edit' (highlighted with a red arrow) and 'Dynamic Mode'. The main area is a table titled 'Accounts' with columns for 'Year', 'Planning Horizon', 'Account', 'Income', 'Account', 'Income', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'SS', 'Total Income', 'Retirement Income', 'Income Gap', and 'Year'. The table data spans from year 70 to 90, showing projected financials for an IRA, Roth IRA, and Savings/Checking accounts. The background of the table cells for years 70-90 is orange, indicating hypothetical returns. The top right of the interface shows 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these are 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'.

Step 12: 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

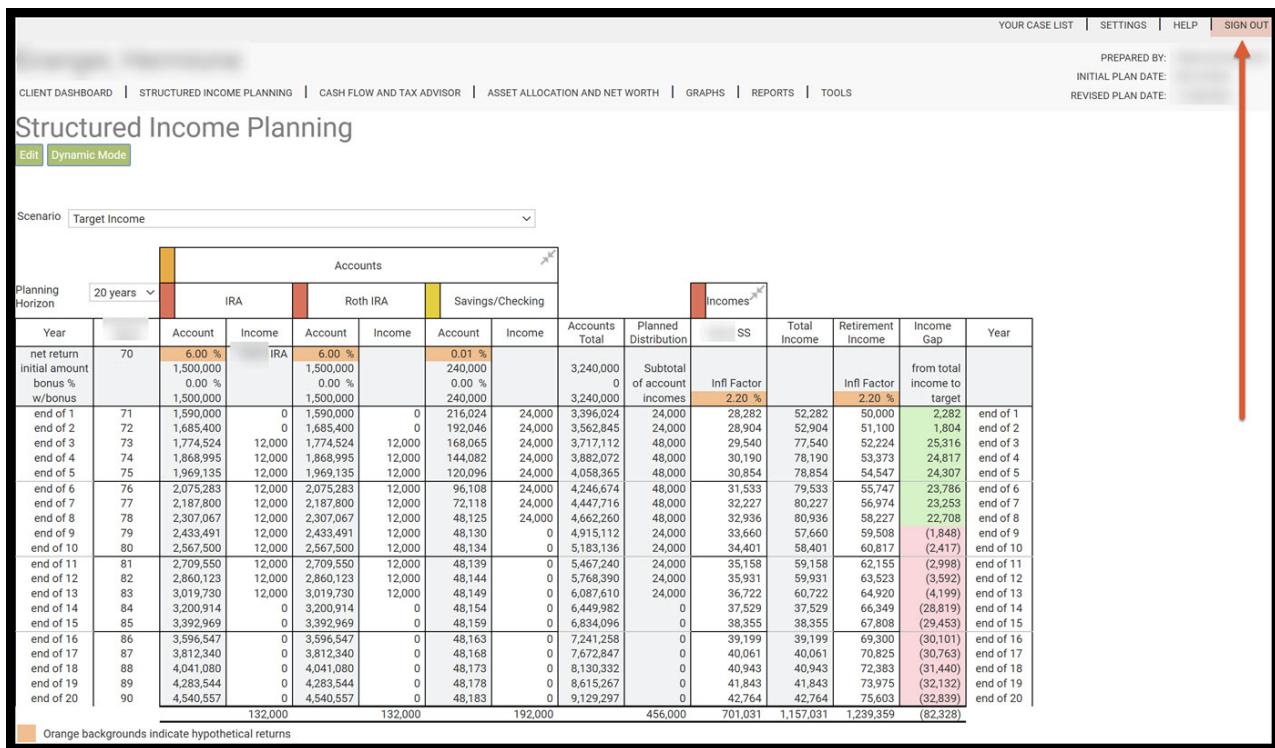
Scenario Target Income

Planning Horizon 2 years

Year	Accounts						Incomes							
	IRA		Roth IRA		Savings/Checking		SS		Total Income		Retirement Income	Income Gap	Year	
Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Subtotal of account incomes	Infl Factor	from total income to target				
70	1,590,000 6.00 % 1,500,000 0.00 % 1,500,000	1,590,000 6.00 % 1,500,000 0.00 % 1,500,000	1,590,000 0.01 % 240,000 0.00 % 240,000	216,024 0 0 0 0	24,000 0 0 0 0	3,240,000 0 0 0 0	3,396,024 24,000 24,000 24,000 24,000	24,000 48,000 48,000 48,000 48,000	28,282 29,540 29,540 30,190 30,854	52,282 77,540 78,190 78,854 78,854	50,000 52,224 53,373 54,547 54,547	2,282 2,5316 24,817 24,307 2,417	end of 1 end of 2 end of 3 end of 4 end of 5	
end of 1	71	2,075,283	12,000	2,075,283	12,000	96,108	24,000	42,46,674	48,000	31,533	79,533	55,747	23,786	end of 6
end of 2	72	1,685,400	12,000	1,685,400	12,000	192,046	24,000	3,562,845	24,000	28,904	52,904	51,100	1,804	end of 2
end of 3	73	1,774,524	12,000	1,774,524	12,000	168,065	24,000	3,717,112	48,000	29,540	77,540	52,224	25,316	end of 3
end of 4	74	1,868,995	12,000	1,868,995	12,000	144,082	24,000	3,882,072	48,000	30,190	78,190	53,373	24,817	end of 4
end of 5	75	1,969,135	12,000	1,969,135	12,000	120,096	24,000	4,058,365	48,000	30,854	78,854	54,547	24,307	end of 5
end of 6	76	2,075,283	12,000	2,075,283	12,000	96,108	24,000	42,46,674	48,000	31,533	79,533	55,747	23,786	end of 6
end of 7	77	2,187,800	12,000	2,187,800	12,000	72,118	24,000	4,447,716	48,000	32,227	80,227	56,974	32,253	end of 7
end of 8	78	2,307,067	12,000	2,307,067	12,000	48,125	24,000	4,662,260	48,000	32,936	80,936	58,227	22,708	end of 8
end of 9	79	2,433,491	12,000	2,433,491	12,000	48,130	0	4,915,112	24,000	33,660	57,660	59,508	(1,848)	end of 9
end of 10	80	2,567,500	12,000	2,567,500	12,000	48,134	0	5,183,136	24,000	34,401	58,401	60,817	(2,417)	end of 10
end of 11	81	2,709,550	12,000	2,709,550	12,000	48,139	0	5,467,240	24,000	35,158	59,158	62,155	(2,998)	end of 11
end of 12	82	2,860,123	12,000	2,860,123	12,000	48,144	0	5,768,390	24,000	35,931	59,931	63,523	(3,592)	end of 12
end of 13	83	3,019,730	12,000	3,019,730	12,000	48,149	0	6,087,610	24,000	36,722	60,722	64,920	(4,199)	end of 13
end of 14	84	3,200,914	0	3,200,914	0	48,154	0	6,449,982	0	37,529	37,529	66,349	(28,819)	end of 14
end of 15	85	3,392,969	0	3,392,969	0	48,159	0	6,834,096	0	38,355	38,355	67,808	(29,453)	end of 15
end of 16	86	3,596,547	0	3,596,547	0	48,163	0	7,241,258	0	39,199	39,199	69,300	(30,101)	end of 16
end of 17	87	3,812,340	0	3,812,340	0	48,168	0	7,672,847	0	40,061	40,061	70,825	(30,763)	end of 17
end of 18	88	4,041,080	0	4,041,080	0	48,173	0	8,130,332	0	40,943	40,943	72,383	(31,440)	end of 18
end of 19	89	4,283,544	0	4,283,544	0	48,178	0	8,615,267	0	41,843	41,843	73,975	(32,132)	end of 19
end of 20	90	4,540,557	0	4,540,557	0	48,183	0	9,129,297	0	42,764	42,764	75,603	(32,839)	end of 20
		132,000	132,000	192,000	192,000	456,000	456,000	701,031	701,031	1,157,031	1,157,031	1,239,359	(82,328)	

Orange backgrounds indicate hypothetical returns

Step 13: 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 Target Income

Planning Horizon 2 years

Year	Accounts						Incomes							
	IRA		Roth IRA		Savings/Checking		SS		Total Income		Retirement Income	Income Gap	Year	
Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Subtotal of account incomes	Infl Factor	from total income to target				
70	1,590,000 6.00 % 1,500,000 0.00 % 1,500,000	1,590,000 6.00 % 1,500,000 0.00 % 1,500,000	1,590,000 0.01 % 240,000 0.00 % 240,000	216,024 0 0 0 0	24,000 0 0 0 0	3,240,000 0 0 0 0	3,396,024 24,000 24,000 24,000 24,000	24,000 48,000 48,000 48,000 48,000	28,282 29,540 29,540 30,190 30,854	52,282 77,540 78,190 78,854 78,854	50,000 52,224 53,373 54,547 54,547	2,282 2,5316 24,817 24,307 2,417	end of 1 end of 2 end of 3 end of 4 end of 5	
end of 1	71	2,075,283	12,000	2,075,283	12,000	96,108	24,000	42,46,674	48,000	31,533	79,533	55,747	23,786	end of 6
end of 2	72	1,685,400	12,000	1,685,400	12,000	192,046	24,000	3,562,845	24,000	28,904	52,904	51,100	1,804	end of 2
end of 3	73	1,774,524	12,000	1,774,524	12,000	168,065	24,000	3,717,112	48,000	29,540	77,540	52,224	25,316	end of 3
end of 4	74	1,868,995	12,000	1,868,995	12,000	144,082	24,000	3,882,072	48,000	30,190	78,190	53,373	24,817	end of 4
end of 5	75	1,969,135	12,000	1,969,135	12,000	120,096	24,000	4,058,365	48,000	30,854	78,854	54,547	24,307	end of 5
end of 6	76	2,075,283	12,000	2,075,283	12,000	96,108	24,000	42,46,674	48,000	31,533	79,533	55,747	23,786	end of 6
end of 7	77	2,187,800	12,000	2,187,800	12,000	72,118	24,000	4,447,716	48,000	32,227	80,227	56,974	32,253	end of 7
end of 8	78	2,307,067	12,000	2,307,067	12,000	48,125	24,000	4,662,260	48,000	32,936	80,936	58,227	22,708	end of 8
end of 9	79	2,433,491	12,000	2,433,491	12,000	48,130	0	4,915,112	24,000	33,660	57,660	59,508	(1,848)	end of 9
end of 10	80	2,567,500	12,000	2,567,500	12,000	48,134	0	5,183,136	24,000	34,401	58,401	60,817	(2,417)	end of 10
end of 11	81	2,709,550	12,000	2,709,550	12,000	48,139	0	5,467,240	24,000	35,158	59,158	62,155	(2,998)	end of 11
end of 12	82	2,860,123	12,000	2,860,123	12,000	48,144	0	5,768,390	24,000	35,931	59,931	63,523	(3,592)	end of 12
end of 13	83	3,019,730	12,000	3,019,730	12,000	48,149	0	6,087,610	24,000	36,722	60,722	64,920	(4,199)	end of 13
end of 14	84	3,200,914	0	3,200,914	0	48,154	0	6,449,982	0	37,529	37,529	66,349	(28,819)	end of 14
end of 15	85	3,392,969	0	3,392,969	0	48,159	0	6,834,096	0	38,355	38,355	67,808	(29,453)	end of 15
end of 16	86	3,596,547	0	3,596,547	0	48,163	0	7,241,258	0	39,199	39,199	69,300	(30,101)	end of 16
end of 17	87	3,812,340	0	3,812,340	0	48,168	0	7,672,847	0	40,061	40,061	70,825	(30,763)	end of 17
end of 18	88	4,041,080	0	4,041,080	0	48,173	0	8,130,332	0	40,943	40,943	72,383	(31,440)	end of 18
end of 19	89	4,283,544	0	4,283,544	0	48,178	0	8,615,267	0	41,843	41,843	73,975	(32,132)	end of 19
end of 20	90	4,540,557	0	4,540,557	0	48,183	0	9,129,297	0	42,764	42,764	75,603	(32,839)	end of 20
		132,000	132,000	192,000	192,000	456,000	456,000	701,031	701,031	1,157,031	1,157,031	1,239,359	(82,328)	

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.
