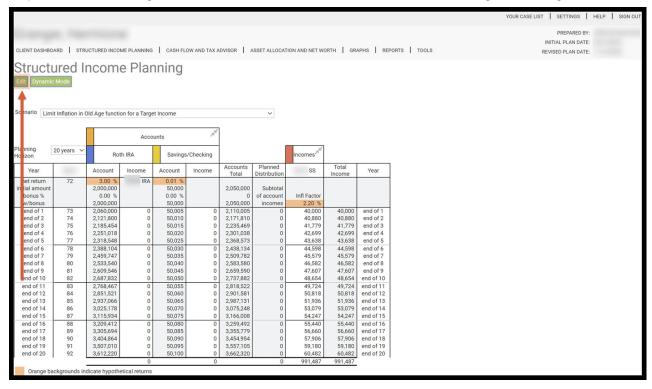
## Limit Inflation in Old Age function for a Target Income

11/22/2024 12:12 pm EST

On the Structured Income Planning page, under the 'Add Target' function, there is an option to set a cap on inflation adjustments for older clients. Below are the step-by-step guidelines for limiting inflation in old age.

	green Edit button undernea		
Stop 1. Edit. ( lick on the	groon Edit hutton undornor	th the Structured Incom	o Vianning clih-hoading
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Step 2: Add Target: Click on the green Add Target button underneath the Structured Income Planning sub heading.

INITIAL PLAN DA													YOUR CASE LIST SETTINGS
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Verar         20 years         RA         Saving-/r         classical         Plannes/r         Income         Year           vear         Account         Income         Account         In come         Accounts         Plannes/r         Netrosco           vear         Account         Income         Account         In come         Accounts         Plannes/r         Netrosco         Year           initial amount         72         3.00 %         IRA         0.01 %         Accounts         Plannes/r         Netrosco         Year           whoms         0.00 %         Income         50.000 %         Income         2.050.000         Subtotal         Income         Accounts         Nensee         Income         Accounts         Nensee         Income         Accounts         Nensee         Income													
Orizon         Roth IRA         Savings/Ch eking         Incomes/N           Year         Account         Income         Account         Income         Accounts         Planna         Status         Total         Distribution           Intel amounts         72         3.00 %         IRA         0.01 %         Souther         Planna         SS         Total         Income         Year           Intel amounts         0.00 %         IRA         0.01 %         Souther         Income         Year         Income         Year           Intel amounts         0.00 %         IRA         0.01 %         Souther         Income         Year         Income         Year           Intel amounts         0.00 %         Intel amounts         Souther         Intel amounts         Intel amounts         Year         Intel amounts         Year           Intel amounts         2.050,000         Intel amounts         Intel amounts         Year         Intel amounts         Year         Intel amounts         Year           Intel af 2         2.050,000         Intel amounts         Intel amounts         Year         Intel amounts         Year           Intel af 2         2.050,000         Intel amounts         Year         Year         Yea				Acco	unts	×							
Veral         Account         Income         Account         Income         Planne           Tet return         72         3.00 f         Income         Account         Income         Planne         SS         Income         Year           Inal amount         72         3.00 f         Income         S0.00 f         S0.00 f         S0.00 f         Statuation         SS         Income         Year           Inal amount         72         3.00 f         Income         S0.00 f         S0.00 f         S0.00 f         Statuation         SS         Income         Year           Inal amount         2.000.00         Manage         S0.00 f         Income         2.050.00 f         Manage         Income         2.050.00 f         Manage           end of 1         73         2.050.00 f         S0.00 f         Income         2.050.00 f         Manage         Adout of the factor         Adout of the factor           end of 2         74         2.158.04 f         S0.01 f         Income         2.050.00 f         Manage         Adout of the factor           end of 5         77         2.315.48 f         S0.00 f         Income         Adout of the factor         Adout of the factor           end of 5         77 <td< td=""><td></td><td>20 years 🗸</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>		20 years 🗸											
Year         Account         Income         Account         Income         Total         Distribution         SS         Income         Year           intial amount bonus %         72         300 %         Income         Income         2000,000         Income         2000,000         Income         2000,000         S0,000         Income         2000,000         Income         2000,000 <td>orizon</td> <td></td> <td>Rot</td> <td>h IRA</td> <td>Savings/</td> <td>Checking</td> <td></td> <td></td> <td>Incomes</td> <td></td> <td></td> <td></td> <td></td>	orizon		Rot	h IRA	Savings/	Checking			Incomes				
11til arount bornus %         2.000,00         Image 0,00         Southoral 0 of account 2.050,000         Manage 0 of account 0 of account 2.050,000         Manage 0 of account 0 of account 2.050,000         Manage 0 of account 0 of account 0 of account 0 of account 2.050,000         Manage 0 de 0.00           end of 1         73         2.060,000         0         S0005         0         2.110,005         0         40,000         40,000         end of 1           end of 2         74         2.151,005         0         S0,015         0         2.235,499         0         41,779         end of 2           end of 3         75         2.155,454         0         S0,015         0         2.235,499         0         42,659         42,659         end of 4           end of 5         77         2.318,548         0         S0,025         0         2.368,573         0         44,588         end of 5           end of 6         77         2.318,548         0         S0,025         0         2.389,590         0         44,589         44,5589         end of 6           end of 7         78         2.459,747         0         S0,050         0         2.737,82         0         44,554         44,554         46,554         end of 1           en	Year		Account	Income	Account	li come			SS		Year		
bonus%         0.00%         0.00%         0         of account         Inflatedra           end of 1         72         2.050000         Messae         50,000         in nage: 2.05000         in comparing the second s		72		IRA			0.050.000	0.1					
wboms         vert         2000,000         Mansper         50,000         No         nage         20,000         Mansper         50,000         No         nage         20,000         Mansper         vert         Mansper           end of 1         73         2060,000         0         50,000         0         2,110,005         0         40,000         end of 1           end of 2         74         2,121,806         0         50,015         0         2,235,499         0         41,779         end of 3         75         2,155,454         0         50,025         0         2,236,573         0         42,639         end of 4         6													
$ \begin{array}{cccccccccccccccccccccccccccccccccccc$				Manage		A anade							
end of 2       74       2,121,800       0       50,010       0       2,171,810       0       40,880       end of 2         end of 3       75       2,185,454       0       50,020       0       2,231,038       0       40,880       end of 3         end of 4       76       2,251,018       0       50,020       0       2,328,69       0       42,699       42,699       end of 5         end of 6       77       2,318,548       0       50,025       0       2,368,573       0       44,588       end of 5         end of 7       78       2,383,104       0       50,025       0       2,589,782       0       44,559       end of 5         end of 8       2,609,546       0       50,035       0       2,599,782       0       44,559       end of 1         end of 1       83       2,669,546       0       50,045       0       2,589,580       0       44,564       46,564       end of 1         end of 1       83       2,669,546       0       50,045       0       2,713,882       0       44,564       46,564       end of 11         end of 1       83       2,669,378       0       50,075       0       2,81		73				0 and ge				40.000	end of 1		
end of 3       75       2,185,A54       0       50,015       0       2,225,499       0       41,779       41,779       end of 4         end of 4       76       2,251,018       0       50,025       0       2,236,473       0       42,699       42,699       end of 4         end of 5       77       2,318,548       0       50,025       0       2,368,73       0       43,638       44,598       end of 6         end of 7       79       2,459,747       0       50,025       0       2,368,73       0       44,598       end of 7         end of 8       80       2,533,840       0       50,040       0       2,583,580       0       44,552       end of 7         end of 9       2,669,782       0       50,055       0       2,737,882       0       43,654       end of 1         end of 1       82       2,678,487       0       50,055       0       2,818,522       0       49,724       49,724       40 of 11         end of 12       84       2,851,521       0       50,055       0       2,818,522       0       49,724       49,724       40 of 11         end of 13       852       2,80,476       0 <td< td=""><td></td><td></td><td></td><td></td><td></td><td>0</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>						0							
end of 5       77       2318,548       0       50.025       0       2.486,737       0       43.638       end of 5         end of 6       78       2.388,104       0       50.035       0       2.486,134       0       44.598       end of 6         end of 7       79       2.489,747       0       50.030       0       2.488,134       0       44.598       end of 6         end of 7       2.533,540       0       50.040       0       2.583,580       0       44.552       end of 7         end of 8       0       2.569,782       0       50.055       0       2.737,882       0       48.654       end of 10         63       2.667,832       0       50.055       0       2.737,882       0       48.654       end of 11         end of 12       84       2.851,521       0       50.065       0       2.901,811       0       50.818       50.936       end of 12         end of 13       85       2.937,066       0       50.070       0       3.075,248       0       53.079       end of 13         end of 14       86       3.025,178       0       50.070       0       3.055,092       0       55.440       55.	end of 3	75	2,185,454	0		0	2,235,469	0	41,779	41,779	end of 3		
end of 6         78         2,388,104         0         50,030         0         2,438,134         0         44,598         44,598         end of 7           end of 7         79         2,459,747         0         50,035         0         2,509,782         0         44,598         44,598         end of 7           end of 8         0         2,509,782         0         45,579         45,579         end of 7           end of 9         81         2,609,546         0         50,045         0         2,583,580         0         45,557         end of 18           end of 10         82         2,687,382         0         50,055         0         2,737,882         0         44,564         48,564         end of 10           end of 11         83         2,768,467         0         50,055         0         2,737,882         0         45,579         end of 11         end of 13         50,915         0         2,911,81         0         50,918         50,918         end of 12         end of 13         50,257         0         3,075,248         0         53,079         end of 14         86         3,025,178         50,070         0         3,075,248         0         53,079         end of 14	end of 4	76	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	end of 4		
end of 7         79         2,459,747         0         50,085         0         2,809,782         0         45,579         45,579         end of 7           end of 8         0         2,509,546         0         50,045         0         2,583,580         0         45,579         end of 7           end of 9         81         2,609,546         0         50,045         0         2,583,580         0         445,654         46,654         end of 9           end of 10         62         2,667,832         0         50,045         0         2,773,82         0         445,654         48,654         end of 10           end of 12         84         2,851,821         0         50,065         0         2,901,581         0         447,724         49,724         end of 11           end of 12         84         2,851,821         0         50,065         0         2,901,811         0         51,935         end of 13           end of 13         85         2,937,066         0         50,075         0         3,075,248         0         53,079         end of 13           end of 14         86         3,025,178         0         50,075         0         3,056,048         0 <td>end of 5</td> <td></td> <td></td> <td></td> <td>50,025</td> <td></td> <td>2,368,573</td> <td></td> <td>43,638</td> <td>43,638</td> <td>end of 5</td> <td></td> <td></td>	end of 5				50,025		2,368,573		43,638	43,638	end of 5		
end of 8         80         2,533,540         0         50,040         0         2,838,580         0         46,582         end of 8           end of 9         81         2,609,546         0         50,045         0         2,559,590         0         47,607         47,607         end of 9           end of 10         82         2,607,832         0         50,055         0         2,737,882         0         44,654         end of 10           end of 11         83         2,768,467         0         50,055         0         2,818,522         0         44,654         end of 11           end of 13         85         2,937,066         0         50,055         0         2,818,522         0         49,724         end of 11           end of 13         85         2,937,066         0         50,015         0         2,901,511         0         50,818         end of 12           end of 14         86         3,025,178         0         50,075         0         3,075,248         0         53,079         end of 18           end of 14         87         3,115,934         0         50,075         0         3,65,008         0         54,247         end of 18													
end of 19         81         2,609,546         0         50,045         0         2,459,500         0         47,607         47,607         end of 10           end of 10         82         2,687,882         0         50,055         0         2,473,782         0         48,654         48,654         48,654         end of 10           end of 11         83         2,768,467         0         50,055         0         2,817,821         0         49,724         49,724         end of 11           end of 12         84         2,851,521         0         50,065         0         2,901,811         0         50,918         60,011           end of 13         85         2,937,065         0         50,070         0         3,075,248         0         51,935         end of 13           end of 14         86         3,025,178         0         50,070         0         3,075,248         0         53,079         end of 14           end of 16         88         3,209,412         0         50,070         0         3,259,492         0         55,440         55,440         end of 17           end of 17         89         3,305,694         0         50,205         0         3,454,													
end of 10       82       2,687,832       0       50,050       ■       0       2,737,882       0       48,654       end of 10         end of 11       83       2,768,467       0       50,055       0       2,818,522       0       49,724       49,724       49,724       end of 11         end of 12       84       2,815,521       0       50,065       0       2,915,81       0       50,818       end of 12         end of 13       85       2,937,066       0       50,065       0       2,987,131       0       51,936       end of 13         end of 14       66       3,025,178       0       50,075       0       3,166,008       0       55,470       53,079       end of 15         end of 14       88       3,209,412       0       50,075       0       3,166,008       0       54,447       54,447       end of 15         end of 15       87       3,115,934       0       50,075       0       3,255,479       0       55,440       end of 15         end of 17       98       3,305,694       0       50,956       0       3,557,1705       0       55,460       55,660       end of 18         end of 18       90 <td></td>													
end of 11         83         2,758,467         0         50,055         0         2,818,522         0         49,724         49,724         end of 11           end of 12         84         2,851,521         0         50,065         0         2,901,361         0         50,818         50,818         6nd of 12           end of 13         85         2,937,066         0         50,055         0         2,901,361         0         50,936         6nd of 12           end of 14         86         3,025,178         0         50,070         0         3,075,248         0         53,079         end of 14           87         3,115,934         0         50,077         0         3,066,008         0         54,247         54,247         end of 16           end of 16         88         3,209,412         0         50,085         0         3,259,492         0         55,440         55,440         end of 16           end of 18         90         3,404,864         0         50,095         0         3,355,779         0         55,666         56,660         end of 18           end of 18         90         3,404,864         0         50,095         0         3,557,105         0 </td <td></td>													
end of 12         84         2851 521         0         50,060         0         2,901,81         0         50,818         6nd of 12           end of 13         85         2,937,066         0         50,066         0         2,901,811         0         51,936         end of 12           end of 14         86         3,025,178         0         50,070         0         3,072,484         0         51,936         end of 13           end of 16         87         3,115,934         0         50,075         0         3,166,008         0         54,247         54,247         end of 15           end of 16         88         3,209,412         0         50,086         0         3,255,779         0         55,660         55,966         end of 18           end of 17         89         3,305,644         0         50,095         0         3,355,779         0         55,660         57,906         end of 18           end of 18         3,404,864         0         50,095         0         3,557,105         0         59,180         end of 19           end of 20         92         3,612,220         0         50,095         0         3,567,305         0         60,422         60,				-									
end of 13 end of 14         85 86         2,937,066         0         50,065         0         2,987,131         0         51,936         end of 13           end of 14         86         3,025,178         0         50,075         0         3,075,248         0         53,079         end of 14           end of 15         87         3,115,934         0         50,075         0         3,075,248         0         53,079         end of 14           end of 15         88         3,209,412         0         50,085         0         3,259,492         0         55,440         end of 15           end of 18         98         3,305,694         0         50,095         0         3,255,799         0         56,660         end of 17           end of 18         90         3,404,864         0         50,095         0         3,454,954         0         57,906         end of 18           end of 19         3,507,010         0         50,095         0         3,557,105         0         59,180         59,180         end of 19           end of 20         3,612,220         0         50,100         0         8,642,320         0         66,422, ed         66,422, ed         66,442													
end of 14         66         3.025,17.8         0         5.0070         0         3.075,24.8         0         F3.079         end of 14           end of 15         3         3.15.934         0         5.0070         0         3.064.08         0         54.24         7         64.04         end of 15           end of 16         88         3.209,412         0         50.080         0         3.259,492         0         55.440         end of 16           end of 17         89         3.305,644         0         50.085         0         3.355,779         0         55.640         55.660         end of 16           end of 18         3.040,864         0         50.095         0         3.355,779         0         55.660         57.906         end of 18           end of 18         3.050,510         0         3.355,779         0         55.660         57.906         end of 18           end of 19         9         3.507,010         0         50.095         0         3.557,105         0         59.180         end of 19           end of 20         26,1220         0         50,100         0         8.662,320         60.642         60.642         60.642													
end of 15         87         3,115,934         0         50,075         0         3,166,048         0         54,247         end of 15           end of 16         88         3,209,412         0         50,080         0         3,259,492         0         65,440         end of 15           end of 17         89         3,305,594         0         55,440         55,640         end of 17           end of 18         90         3,404,864         0         50,090         0         3,454,954         0         57,906         67,906         end of 18           end of 18         90         3,612,220         0         50,095         0         3,557,105         0         59,180         59,180         end of 19           end of 20         92         .612,220         0         50,100         0         3,652,320         0         66,424, 26         60,462         end of 20				-		-							
end of 16         88         3.209.412         0         50.080         0         3.259.492         0         55.440         55.440         end of 16           end of 17         89         3.305.694         0         50.085         0         3.355.779         0         56.660         end of 17           end of 18         90         3.404.864         0         50.090         0         3.454.954         0         57.906         end of 18           end of 19         91         3.507.010         0         50.095         0         3.557.105         0         59.180         59.180         end of 19           end of 20         25         3.627.220         0         50.100         0         8.662.320         0         6.642.2         6.0422         6.0425													
end of 17         89         3,305,694         0         50,085         0         3,355,779         0         56,660         end of 17           end of 18         90         3,404,864         0         50,090         0         3,454,954         0         57,906         67,906         end of 18           end of 19         3,507,110         0         50,010         0         3,454,954         0         57,916         67,906         end of 18           end of 20         92         3,612,220         0         50,100         0         3,652,320         0         60,482         end of 20													
end of 18         90         3,404,864         0         50,090         0         3,454,954         0         57,906         57,906         end of 18           end of 19         3,507,010         0         50,095         0         3,557,105         0         59,180         59,180         end of 19           end of 20         2,612,220         0         50,100         0         3,652,320         0         60,462         60,462         end of 20													
end of 19         91         3,507,010         0         50,095         0         3,557,105         0         59,180         end of 19           end of 20         92         3,612,220         0         50,100         0         3,662,320         0         60,482         60,482         end of 20													
end of 20 92 3,612,220 0 50,100 0 3,662,320 0 60,482 60,482 end of 20													
V V VV/10/	010 01 20	12	0,012,220		00,100		0,002,020				0110 01 20		
Orange backgrounds indicate hypothetical returns						0		0	291,407	221,407			

## Step 3: Target Name: Enter in Target Name.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Target					
Target name	Target Income			Target Adjustments	
First year target income Inflation rate Target description Limit inflation in old age Age for limit	0.0 %	ADD ADJUSTMENT Pick year(s) Pick year(s) to remove Reset all years	Year 1 2 3 4 5 6 7 8 9 10 11 11 12 13 14 15 16 17 18 19 20 21 22	Target adjustment	
Orange backgrounds indicate hypotheti	All a second	Note that entered only in	23 24	to following years when blan	* }

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

		Ŷ	OUR CASE LIST   SETTINGS   HELP   SIGN OUT
Manage Target			
Target name	Retirement Income	ADD ADJUSTMENT	Target Adjustments Year Target adjustment *
First year target income			] 1
Inflation rate	0.0 %	Pick year(s)	3
Target description		Pick year(s) to remove	5 6 7
Limit inflation in old age	0		8
Age for limit	Client 1 age Client 2 age	Reset all years	9
			12
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			)
			) 16 ) 17
			18
			19
			20
			23
		4	n 24
Orange backgrounds indicate hypothet	tical returns	Note that entered values W	/ILL roll down to following years when blank

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

Save     Cancel       Target name     Relirement Income       First year target income     \$120,000				YOUR CASE LIST SETTINGS HELP SIGN OUT
Target name Retirement Income     First year target income     \$120,000     inflation rate   0.0     Target description   Limit inflation in old age   Age for limit     0    0    0	Manage Target			
First year target income       1         inflation rate       0.0         Target description       -         Limit inflation in old age       -         Age for limit       0       Client 1 age       Client 2 age         Reset all years       -         10       -       -         22       -       -         23       -       -	Target name	Retirement Income		Source - respect and concarded
Inflation rate 0.0   Target description   Limit inflation in old age   Age for limit   O   Client 1 age   Client 2 age   Reset all years   11   12   13   14   15   16   17   18   19   20   21   22   23	First year target income	\$120,000	ADD ADJOSTMENT	
Target description Pick year(s) to remove   Umit inflation in old age 8   Age for limit 0   Client 1 age Client 2 age   Reset all years 10   11 12   13 14   15 16   16 17   18 19   20 21   21 22   22 23	Inflation rate	0.0 %	Pick year(s)	4
Age for limit       0       Client 1 age       Client 2 age       0         10       10       11         12       13       14         14       15       16         15       16       17         18       19       20         21       23       24			Pick year(s) to remove	6
Reset all years	21 The Providence of Co.			U
□ 12 □ 13 □ 14 □ 15 □ 16 □ 17 □ 18 □ 19 □ 20 □ 21 □ 22 □ 22 □ 23 □ 23 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24	Age for limit	0 Client 1 age Client 2 age	Reset all years	
□ 13 □ 14 □ 15 □ 16 □ 17 □ 18 □ 19 □ 20 □ 21 □ 21 □ 22 □ 22 □ 22 □ 22 □ 23 □ 23 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24				0
□ 15 □ 16 □ 17 □ 18 □ 19 □ 20 □ 21 □ 22 □ 22 □ 23 □ 23				0
□ 16 □ 17 □ 18 □ 19 □ 20 □ 21 □ 22 □ 22 □ 22 □ 23 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24 □ 24				
17 18 19 20 21 22 22 23 4 24 4 24 4 24 5 24 5 24 5 24 5 24 5 5 5 5 5 5 5 5 5 5 5 5 5				0
□ 19 □ 20 □ 21 □ 22 □ 23 ▼ 24 ▼ ▶				
20 21 22 22 23 4 24				0
21 22 23 24				
Crance beckgrounde indicate bunchbotical eturns				-
	Orange backgrounds indicate hypothe	tion returns	Note that entered value	es WILL roll down to following years when blank

Step 6: Target Description: Enter in a description.

		YOUR C	CASE LIST SETTINGS HELP SIGN OUT
Manage Target			
Target name	Retirement Income		Target Adjustments
Child at the		ADD ADJUSTMENT Ye	
First year target income	\$120,000	2	
Inflation rate	2.2 %	Pick year(s)	
			5
Target description		Pick year(s) to remove	
Limit inflation in old age			
Age for limit	O Client 1 age Client 2 age	°	
	0 Olient Lage 0 Olient 2 age	Reset all years	0
			5
		24	0
		22	
		- 24	4
Our and the strength is directed by set of		4	oll down to following years when blank
Orange backgrounds indicate hypothet	lical returns	Note that entered values WILL re	oli down to following years when blank

Step 7: Limit Inflation In Old Age: Click on the text box.

		YOUR CASE	LIST SETTINGS HELP	SIGN OUT
Manage Target				
Target name	Retirement Income		Target Adjustments	
First year target income	ADD ADJUSTMENT \$120,000	Year 1 2	Target adjustment	Â
Inflation rate	2.2 S Pick year(s)			
	Retirement Income Pick year(s) to remove			
Limit inflation in old age		8		
Age for limit	0 Client 1 age Client 2 age Reset all years	9		- 1
		11 12 13		
		14		- 1
		16 17		
		18 19 20		
		21		
		23 - 24		+
Orange backgrounds indicate hypotheti	ical returns Note that entered	values WILL roll do	own to following years when bla	nk

Step 8: Age for Limit: Type in numeric number.

		YOU	R CASE LIST SETTINGS HELP SIGN OUT
Manage Target			
Target name	Retirement Income		Target Adjustments
	Retrement income	ADD ADJUSTMENT	Year Target adjustment
First year target income	\$120,000		1 2
Inflation rate	2.2 %	Pick year(s)	3 4
Target description	Retirement Income		5
		Pick year(s) to remove	7
Limit inflation in old age			8
Age for limit	0 Client 1 age O Client 2 age	Reset all years	9
	<b>A</b>		11
			12
		ŏ	13
			14
			15
			16
			17 18
		U	19
			20
			21
			22
			23
	*		24
Orange backgrounds indicate hypothet	tical returns	Note that entered values WILI	L roll down to following years when blank

## Step 9: Client radio button: Click which radio button this limit is referring to.

			YOUR CASE LIST	r settings help si	IGN OUT
Manage Target					
Target name				Target Adjustments	
rarget name	Retirement Income	ADD ADJUSTMENT	Year	Target adjustment	
First year target income	\$120,000				
Inflation rate	2.2 %	Pick year(s)	3		
Target description	Retirement Income		5		
		Pick year(s) to remove	7		
	$\boxtimes$		8		- 11
Age for limit	80 Client 1 age Client 2 age	Reset all years	10		
			11		- 11
			12		- 11
			13		- 11
			14		- 11
			16		
			17		
			18		
			19		
			20		
			22		
			23		100
			4 24		+
Orange backgrounds indicate hypothet	ical returns	Note that entered value	es WILL roll down	to following years when blank	

Step 10: Save: Click on the green Save button underneath the Manage Target subheading.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Target					
Save Cancel					
<b>†</b>				Target Adjustments	
Taiget name	Retirement Income	ADD ADJUSTMENT	Year	Target adjustment	
Fir t year target income	\$120,000			raiger aujustment	Î
Infation rate	2.2 %	Pick year(s)	3		
	2.2 ~		4		
Target description	Retirement Income	Pick year(s) to remove	6		
Lin it inflation in old age	$\bigotimes$		8		
Ag for limit	80 Client 1 age Client 2 age	Reset all years	9 10		
			11 12		
1			12 13		
			14		- 1
			16		
			17 18		
			19 20		
			21		
			22 23		
			~ 24 4		• •
Orange backgrounds indicate hypotheti	ical returns	Note that entered value	WILL roll down	to following years when blar	ak

Step 11: Structured Income Plan: Two new columns have appeared in the structured income plan: the target income and the income gap.

										1	1		YOUR CASE LIST SETTINGS HELP SIG
													PREPARED BY:
													INITIAL PLAN DATE:
CLIENT DASHBO	DARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	FION AND NET W	ORTH GR	APHS RE	ORTS TO	OLS	REVISED PLAN DATE:
Struct	urod li	ncom	o Plar	nina									
Edit Save C	Cancel Add /	Account Add	d Income A	dd Inc Tax 🖌	Add Target	Edit or Add So	enario Disp	lay Options					
Scenario Lim	hit Inflation in C	Old Age function	on for a Targe	et Income			~						
						1							
			Acco	ounts	7								
Planning	20 years v	120			101								
Horizon		Rot	th IRA	Savings	/Checking			Incomes					
Year	1000	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Income Gap	Year	
net return	72	3.00 %	IRA	0.01 %									
initial amount bonus %		2,000,000		50,000 0.00 %		2,050,000	Subtotal of account	Manage Infl Factor		Manage Infl Factor	from total income to		
w/bonus		2,000,000	Manage	50,000	Manage	2,050,000	incomes	2.20 %		2.20 %	target		
end of 1	73	2,060,000	0	50,005	0 O	2,110,005	0	40,000	40,000	120,000	(80,000)	end of 1	
end of 2	74	2,121,800	0	50,010	0	2,171,810	0	40,880	40,880	122,640	(81,760)	end of 2	
end of 3	75	2,185,454	0	50,015	0	2,235,469	0	41,779	41,779	125,338	(83,559)	end of 3	
end of 4	76	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	128,096	(85,397)	end of 4	
end of 5	77	2,318,548	0	50,025	0	2,368,573	0	43,638	43,638	130,914	(87,276)	end of 5	
end of 6	78	2,388,104	0	50,030	0	2,438,134	0	44,598	44,598	133,794	(89,196)	end of 6	
end of 7	79	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,737	(91,158)	end of 7	
end of 8	80	2,533,540	0	50,040	0	2,583,580	0	46,582	46,582	139,745	(93,164)	end of 8	
end of 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9	
end of 10 end of 11	82	2,687,832	0	50,050	0	2,737,882 2.818.522	0	48,654 49,724	48,654	139,745 139,745	(91,091)	end of 10	
end of 11 end of 12	83	2,768,467	0	50,055 50,060	0	2,818,522		49,724 50,818	49,724 50,818	139,745	(90,021) (88,927)	end of 11 end of 12	
end of 12	85	2,937,066	0	50,065	0	2,901,581	0	51,936	51,936	139,745	(87,809)	end of 12 end of 13	
end of 14	86	3,025,178	0	50,000	0	3,075,248	0	53,079	53,079	139,745	(86,667)	end of 13	
end of 15	87	3,115,934	0	50,075	ő	3,166,008	o o	54,247	54,247	139,745	(85,499)	end of 15	
end of 16	88	3,209,412	0	50,080	0	3,259,492	0	55,440	55,440	139,745	(84,305)	end of 16	
end of 17	89	3,305,694	0	50,085	0	3,355,779	0	56,660	56,660	139,745	(83,086)	end of 17	
end of 18	90	3,404,864	0	50,090	0	3,454,954	0	57,906	57,906	139,745	(81,839)	end of 18	
end of 19	91	3,507,010	0	50,095	0	3,557,105	0	59,180	59,180	139,745	(80,565)	end of 19	
and a6 00	92	3,612,220	0	50,100	0	3,662,320	0	60,482	60,482	139,745	(79,263)	end of 20	
end of 20													
end of 20			0		0		0	991,487	991,487	2,714,207	(1,722,720)		

Step 12: Age Limit: The target income inflation should be limited in the year specified.

													YOUR CASE LIST SETTINGS
													PREPARED B
													INITIAL PLAN DAT
LIENT DASHB	OARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCAT	TION AND NET W	ORTH GR	APHS REF	PORTS   TO	OLS	REVISED PLAN DAT
Struct	ured I	ncom	e Plar	nning									
	Cancel Add				and Treesed		Dise	In Onting					
save	Cancer Auu.	ACCOUNT	u income A		Add Target	Ealt of Add Sc	Disp	lay Options					
cenario Lin	nit Inflation in	Old Age functi	on for a Targe	et Income			$\sim$						
			Acco	unto	74								
			ACCO	Junts									
lanning	20 years 🗸	Rei	th IRA	Covingo	/Checking			Incomes					
orizon		KU	UTIKA	Savings	Checking			incomes					
Year		Account	Income	Account	Income	Accounts	Planned	SS	Total	Retirement	Income	Year	
net return	72	3.00 %	IRA	0.01 %		Total	Distribution		Income	Income	Gap		
nitial amount		2,000,000	INA	50,000		2,050,000	Subtotal	Manage		Manage	from total		
bonus %		0.00 %		0.00 %		0	of account	Infl Factor		Infl Factor	income to		
w/bonus		2,000,000	Manage	50,000	Manage	2,050,000	incomes	2.20 %		2.20 %	target		
end of 1	73	2,060,000	0	50,005	0	2,110,005	0	40,000	40,000	120,000	(80,000)	end of 1	
end of 2	74	2,121,800	0	50,010	0	2,171,810	0	40,880	40,880	122,640	(81,760)	end of 2	
end of 3 end of 4	75	2,185,454	0	50,015	0	2,235,469	0	41,779 42,699	41,779 42,699	125,338 128,096	(83,559)	end of 3	
end of 4 end of 5	70	2,251,018 2,318,548	0	50,020 50,025	0	2,301,038 2,368,573	0	42,699	42,699	128,096	(85,397) (87,276)	end of 4 end of 5	
end of 6	78	2,388,104	0	50,020	0	2,438,134	0	44,598	44,598	133,794	(89,196)	end of 6	
end of 7	79	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,737	(91,158)	end of 7	
end of 8	80	2,533,540	0	50,040	0	2,583,580	0	46,582	46,582	139,745			
end of 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9	
end of 10	82	2,687,832	0	50,050	0	2,737,882	0	48,654	48,654	139,745	(91,091)	end of 10	
end of 11	83	2,768,467	0	50,055	0	2,818,522	0	49,724	49,724	139,745	(90,021)	end of 11	
end of 12	84	2,851,521	0	50,060	0	2,901,581	0	50,818	50,818	139,745	(88,927)	end of 12	
end of 13 end of 14	85 86	2,937,066 3,025,178	0	50,065 50,070	0	2,987,131 3,075,248	0	51,936 53,079	51,936 53,079	139,745 139,745	(87,809) (86,667)	end of 13 end of 14	
end of 14 end of 15	87	3,025,178	0		0	3,075,248	0	54,247	53,079	139,745	(85,499)	end of 14 end of 15	
end of 15 end of 16	87	3,115,934 3,209,412	0	50,075	0	3,166,008	0	54,247	54,247	139,745	(85,499) (84,305)	end of 15 end of 16	
end of 16 end of 17	89	3,209,412	0		0	3,259,492	0	56,660	56,660	139,745	(83,086)	end of 16 end of 17	
	90	3,404,864	0		0	3,355,779	0	57,906	57,906	139,745	(81,839)	end of 18	
end of 18		3,507,010	0	50,095	0	3,557,105	0	59,180	59,180	139,745	(80,565)	end of 19	
end of 18 end of 19	91												
end of 18 end of 19 end of 20	91 92	3,612,220	0	50,100	0	3,662,320	0	60,482	60,482	139,745	(79,263)	end of 20	

Step 13: 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
													PREPARED BY:
										12			INITIAL PLAN DATE:
CLIENT DASHBO	ARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET WO	ORTH GR	APHS RE	ORTS   TO	OLS	REVISED PLAN DATE:
Struct	ured l	ncom	o Plar	nina									
Edit Save C	Cancel Add	Account Add	d Income A	dd Inc Tax 🖌	Add Target		cenario Disp	lay Options					
Scenario Lim	it Inflation in O	Old Age function	on for a Targe	et Income			$\sim$						
					×								
			Acco	ounts	7								
Planning	20 years 🗸	1 22		i	101								
Horizon		Rot	th IRA	Savings	/Checking		_	Incomes'					
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Income Gap	Year	
net return	72	3.00 %	IRA	0.01 %							cap		
initial amount		2,000,000		50,000		2,050,000	Subtotal	Manage		Manage	from total		
bonus % w/bonus		0.00 %	Manage	0.00 % 50.000		0	of account	Infl Factor		Infl Factor	income to		
end of 1	73	2,000,000 2,060,000	Manage 0	50,000	Manage 0	2,050,000 2,110,005	incomes 0	2.20 %	40,000	2.20 %	target (80,000)	end of 1	
end of 2	74	2,121,800	0	50,000	0	2,171,810	o o	40,880	40,880	122,640	(81,760)	end of 2	
end of 3	75	2,185,454	Ő	50,015	0	2,235,469	o o	41,779	41,779	125,338	(83,559)	end of 3	
end of 4	76	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	128,096	(85,397)	end of 4	
end of 5	77	2,318,548	0	50,025	0	2,368,573	0	43,638	43,638	130,914	(87,276)	end of 5	
end of 6	78	2,388,104	0	50,030	0	2,438,134	0	44,598	44,598	133,794	(89,196)	end of 6	
end of 7	79	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,737	(91,158)	end of 7	
end of 8	80	2,533,540	0	50,040	0	2,583,580	0	46,582	46,582	139,745	(93,164)	end of 8	
end of 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9	
end of 10	82	2,687,832	0	50,050	0	2,737,882	0	48,654	48,654	139,745	(91,091)	end of 10	
end of 11	83	2,768,467	0	50,055	0	2,818,522	0	49,724	49,724	139,745	(90,021)	end of 11	
end of 12	84	2,851,521	0	50,060	0	2,901,581	0	50,818	50,818	139,745	(88,927)	end of 12	
end of 13	85	2,937,066	0	50,065	0	2,987,131	0	51,936	51,936	139,745	(87,809)	end of 13	
end of 14	86	3,025,178	0	50,070	0	3,075,248	0	53,079	53,079	139,745	(86,667)	end of 14	
end of 15	87	3,115,934	0	50,075	0	3,166,008	0	54,247	54,247	139,745	(85,499)	end of 15	
end of 16	88	3,209,412	0	50,080	0	3,259,492	0	55,440	55,440	139,745	(84,305)	end of 16	
end of 17	89	3,305,694	0	50,085	0	3,355,779	0	56,660	56,660	139,745	(83,086)	end of 17	
end of 18	90	3,404,864	0	50,090	0	3,454,954	0	57,906	57,906	139,745	(81,839)	end of 18	
end of 19	91	3,507,010	0	50,095	0	3,557,105	0	59,180	59,180	139,745	(80,565)	end of 19	
end of 20	92	3,612,220	0	50,100	0	3,662,320	0	60,482	60,482	139,745	(79,263)	end of 20	
		2	0		0		0	991,487	991,487	2,714,207	(1,722,720)		

Step 14: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

													YOUR CASE LIST SE	ETTINGS HELP
													PI	REPARED BY:
				1									INITIAL	PLAN DATE:
LIENT DASHBO	OARD STRU	ICTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR	ASSET ALLOCAT	TON AND NET WO	ORTH GR	APHS REP	ORTS   TO	OOLS	REVISED	PLAN DATE:
Struct	ured Ir	ncom	- Plar	nina										
				dd Inc Tax A		Edit or Add So								
dit Save C	Cancel Add A	Add	I Income A	dd Inc Tax	dd Target	Edit of Add So	cenario Disp	lay Options						
Lim	nit Inflation in O	ld Age function	on for a Targe	et Income			~							
- L.			Acco	unts	7									
lanning	20 years ∨				101 11		1							
orizon		Rot	h IRA	Savings	/Checking			Incomes						
Yea	10000	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Income Gap	Year		
net return	72	3.00 %	IRA	0.01 %		Total	Distribution		meonie	income	Gap			
nitial ar ount	t i	2,000,000		50,000		2,050,000	Subtotal	Manage		Manage	from total			
bonu: % w/borus		0.00 %	Manage	0.00 % 50,000	Manage	0 2,050,000	of account incomes	Infl Factor 2.20 %		Infl Factor 2.20 %	income to target			
end c 1	73	2,060,000	0	50,005	Manage 0	2,110,005	0	40,000	40,000	120,000	(80,000)	end of 1		
end c 2	74	2,121,800	0	50,010	0	2,171,810	0	40,880	40,880	122,640	(81,760)	end of 2		
end c 3 end c 4	75 76	2,185,454 2,251,018	0	50,015 50,020	0	2,235,469 2,301,038	0	41,779 42,699	41,779 42,699	125,338 128,096	(83,559) (85,397)	end of 3 end of 4		
end c 4 end c 5	70	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	130,914	(87,276)	end of 4 end of 5		
end c 6	78	2,388,104	0	50,030	0	2,438,134	0	44,598	44,598	133,794	(89,196)	end of 6		
end c 7	79	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,737	(91,158)	end of 7		
end c 8	80	2,533,540	0	50,040	0	2,583,580	0	46,582	46,582	139,745	(93,164)	end of 8		
end c 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9		
end of 10 end of 11	82	2,687,832 2,768,467	0	50,050 50,055	0	2,737,882 2,818,522	0	48,654 49,724	48,654 49,724	139,745 139,745	(91,091) (90,021)	end of 10 end of 11		
end of 12	84	2,851,521	0	50,055	0	2,818,522	0	50,818	50,818	139,745	(88,927)	end of 12		
end of 13	85	2,937,066	o	50,065	0	2,987,131	Ő	51,936	51,936	139,745	(87,809)	end of 13		
end of 14	86	3,025,178	0	50,070	0	3,075,248	0	53,079	53,079	139,745	(86,667)	end of 14		
end of 15	87	3,115,934	0	50,075	0	3,166,008	0	54,247	54,247	139,745	(85,499)	end of 15		
end of 16	88	3,209,412	0	50,080	0	3,259,492	0	55,440	55,440	139,745	(84,305)	end of 16		
end of 17	89	3,305,694	0	50,085	0	3,355,779	0	56,660	56,660	139,745	(83,086)	end of 17		
end of 18	90	3,404,864	0	50,090	0	3,454,954	0	57,906	57,906	139,745	(81,839)	end of 18		
end of 19 end of 20	91 92	3,507,010 3,612,220	0	50,095 50,100	0	3,557,105 3,662,320	0	59,180 60,482	59,180 60,482	139,745 139,745	(80,565) (79,263)	end of 19 end of 20		
GIU UI 20	92	3,012,220	0	30,100	0	3,002,320	0	991,487	991,487	2,714,207	(1,722,720)	enu or 20		
			0		0		0	991,407	991,407	2,114,201	(1,122,120)	2.		

Step 15: 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.

													YOUR CASE LIST SET	TINGS
													PRI	EPARED BY:
													INITIAL F	LAN DATE
NT DASHBO	ARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET WO	ORTH   GR.	APHS REF	ORTS   TO	OLS		LAN DATE
													nevices i	EAR DATE.
ructi	ured I	ncom	e Plar	nning										
Dynamic	Mode													
ario Limi	t Inflation in (	Old Age functi					~							
Limi	it inflation in G	Jid Age functi	on for a Targe	et income			~							
			Acco	unts	7									
ning	20 years v		1				1	¥						
ton		Rot	th IRA	Savings	/Checking			Incomes						
Year		Account	Income	Account	Income	Accounts	Planned	SS	Total	Retirement	Income	Year		
et return	72	3.00 %	IRA	0.01 %		Total	Distribution		Income	Income	Gap	25.52		
al amount	1	2,000,000	104	50,000		2,050,000	Subtotal				from total			
onus %		0.00 %		0.00 %		0	of account	Infl Factor		Infl Factor	income to			
/bonus		2,000,000		50,000		2,050,000	incomes	2.20 %		2.20 %	target			
nd of 1	73	2,060,000	0	50,005	0	2,110,005	0	40,000	40,000	120,000	(80,000)	end of 1		
nd of 2	74	2,121,800	0	50,010	0	2,171,810	0	40,880	40,880	122,640	(81,760)	end of 2		
nd of 3	75	2,185,454	0	50,015	0	2,235,469	0	41,779	41,779	125,338	(83,559)	end of 3		
nd of 4	76	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	128,096	(85,397)	end of 4		
nd of 5	77	2,318,548	0	50,025	0	2,368,573	0	43,638	43,638	130,914	(87,276)	end of 5		
nd of 6	78	2,388,104	0	50,030	0	2,438,134	0	44,598	44,598	133,794	(89,196)	end of 6		
nd of 7	79	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,737	(91,158)	end of 7		
nd of 8	80	2,533,540	0	50,040	0	2,583,580	0	46,582	46,582	139,745	(93,164)	end of 8		
nd of 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9		
nd of 10	82	2,687,832	0	50,050	0	2,737,882	0	48,654	48,654	139,745	(91,091)	end of 10		
nd of 11	83	2,768,467	0	50,055	0	2,818,522	0	49,724	49,724	139,745	(90,021)	end of 11		
nd of 12	84	2,851,521	0	50,060	0	2,901,581	0	50,818	50,818	139,745	(88,927)	end of 12		
nd of 13	85	2,937,066	0	50,065	0	2,987,131	0	51,936	51,936	139,745	(87,809)	end of 13		
nd of 14	86	3,025,178	0	50,070	0	3,075,248	0	53,079	53,079	139,745	(86,667)	end of 14		
nd of 15	87	3,115,934	0	50,075	0	3,166,008	0	54,247	54,247	139,745	(85,499)	end of 15		
nd of 16	88	3,209,412	0	50,080	0	3,259,492	0	55,440	55,440	139,745	(84,305)	end of 16		
nd of 17	89	3,305,694	0	50,085	0	3,355,779	0	56,660	56,660	139,745	(83,086)	end of 17		
nd of 18	90	3,404,864	0	50,090	0	3,454,954	0	57,906	57,906	139,745	(81,839)	end of 18		
nd of 19	91	3,507,010	0	50,095	0	3,557,105	0	59,180	59,180	139,745	(80,565)	end of 19		
nd of 20	92	3,612,220	0	50,100	0	3,662,320	0	60,482	60,482	139,745	(79,263)	end of 20		
			0		0		0	991,487	991,487	2,714,207	(1.722.720)			
			0		0		0	551,407	991,407	2,714,207	(1,/22,/20)			

Step 16: 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
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													INITIAL PLAN D
LIENT DASHBOA	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCAT	TION AND NET WO	ORTH GR	APHS REF	PORTS   TO	OLS	REVISED PLAN D
tructu	urod lu	ncom	o Dlar	nina									
								And the second second					
dit Save Ca	ancel Add A	Account Add	d Income A	dd Inc Tax 🛛 🖡	Add Target	Edit or Add So	enario Disp	lay Options					
	<b>T</b>												
cenario Limit	nflation in C	Old Age function	on for a Targe	t Income			~						
					_K								
			Acco	unts	~								
lanning 2	years 🗸	Rot	th IRA	Savinge	/Checking			Incomes					
orizon		KO		Javings	onecking			incomes					
Year	1000	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Gap	Year	
net return	72	3.00 %	IRA	0.01 %									
nitial amount		2,000,000		50,000		2,050,000	Subtotal	Manage		Manage	from total		
bonus % w/bonus		0.00 % 2,000,000	Manage	0.00 % 50,000	Manage	2,050,000	of account incomes	Infl Factor 2.20 %		Infl Factor 2.20 %	income to target		
end of 1	73	2,060,000	Manage 0	50,005	i Manage 0	2,110,005	0	40,000	40,000	120,000	(80,000)	end of 1	
end of 2	74	2,121,800	0	50,010	0	2,171,810	0	40,880	40,880	122,640	(81,760)	end of 2	
end of 3	75	2,185,454	0	50,015	0	2,235,469	0	41,779	41,779	125,338	(83,559)	end of 3	
end of 4	76	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	128,096	(85,397)	end of 4	
end of 5	77	2,318,548	0	50,025	0	2,368,573	0	43,638	43,638	130,914	(87,276)	end of 5	
end of 6	78	2,388,104	0	50,030	0	2,438,134	0	44,598	44,598	133,794	(89,196)	end of 6	
end of 7	79	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,737	(91,158)	end of 7	
end of 8	80	2,533,540	0	50,040	0	2,583,580	0	46,582	46,582	139,745	(93,164)	end of 8	
end of 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9	
end of 10	82	2,687,832	0	50,050	0	2,737,882	0	48,654	48,654	139,745	(91,091)	end of 10	
end of 11	83	2,768,467	0	50,055	0	2,818,522	0	49,724	49,724	139,745	(90,021)	end of 11	
end of 12	84	2,851,521	0	50,060	0	2,901,581	0	50,818	50,818	139,745	(88,927)	end of 12	
end of 13	85	2,937,066	0	50,065	0	2,987,131	0	51,936	51,936	139,745	(87,809)	end of 13	
end of 14	86	3,025,178	0	50,070	0	3,075,248	0	53,079	53,079	139,745	(86,667)	end of 14	
end of 15	87	3,115,934	0	50,075	0	3,166,008	0	54,247	54,247	139,745	(85,499)	end of 15	
end of 16	88	3,209,412	0	50,080	0	3,259,492	0	55,440	55,440	139,745	(84,305)	end of 16	
end of 17	89	3,305,694	0	50,085	0	3,355,779	0	56,660	56,660	139,745	(83,086)	end of 17	
	90	3,404,864	0	50,090	0	3,454,954	0	57,906	57,906	139,745	(81,839)	end of 18	
end of 18		3,507,010	0	50,095	0	3,557,105	0	59,180	59,180	139,745	(80,565)	end of 19	
end of 18 end of 19	91							60.400	60,482	139,745	(70.0(0))	end of 20	
	91 92	3,612,220	0	50,100	0	3,662,320	0	60,482	60,482	139,745	(79,263)	end of 20	

Step 17: 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 SIG
													PREPARED BY:	-
													INITIAL PLAN DATE:	
CLIENT DASHBO	DARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET W	ORTH   GR	APHS REF	PORTS   TO	OLS	REVISED PLAN DATE:	
Structi Edit Dynamic		ncom	e Plar	nning										
Scenario Lim	it Inflation in (	Old Age functi	on for a Targe	et Income			~							
			Acco	unts	×									
Planning Horizon	20 years v	Rot	th IRA	Savings	/Checking			Incomes						
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Retirement Income	Income Gap	Year		
net return	72	3.00 %	IRA	0.01 %		10000000000	1000				12			
initial amount		2,000,000 0.00 %		50,000 0.00 %		2,050,000 0	Subtotal	Infl Factor		In O Franker	from total			
bonus % w/bonus		2,000,000		50,000		2,050,000	of account incomes	2.20 %		Infl Factor 2.20 %	income to target			
end of 1	73	2,060,000	0	50,005	0	2,110,005	0	40,000	40,000	120,000	(80,000)	end of 1		
end of 2	74	2,121,800	0	50,010	0	2,171,810	0	40,880	40,880	122,640	(81,760)	end of 2		
end of 3	75	2,185,454	0	50,015	0	2,235,469	0	41,779	41,779	125,338	(83,559)	end of 3		
end of 4	76	2,251,018	0	50,020	0	2,301,038	0	42,699	42,699	128,096	(85,397)	end of 4		
end of 5	77	2,318,548	0	50,025	0	2,368,573	0	43,638	43,638	130,914	(87,276)	end of 5		
end of 6 end of 7	78 79	2,388,104 2,459,747	0	50,030 50,035	0	2,438,134 2,509,782	0	44,598 45,579	44,598 45,579	133,794 136,737	(89,196)	end of 6 end of 7		
end of 7 end of 8	80	2,459,747	0	50,035	0	2,509,782	0	45,579	45,579	136,/3/	(91,158) (93,164)	end of 7 end of 8		
end of 9	81	2,609,546	0	50,045	0	2,659,590	0	47,607	47,607	139,745	(92,139)	end of 9		
end of 10	82	2,687,832	0	50,050	0	2,737,882	0	48,654	48,654	139,745	(91,091)	end of 10		
end of 11	83	2,768,467	0	50,055	0	2,818,522	0	49,724	49,724	139,745	(90,021)	end of 11		
end of 12	84	2,851,521	0	50,060	0	2,901,581	0	50,818	50,818	139,745	(88,927)	end of 12		
end of 13	85	2,937,066	0	50,065	0	2,987,131	0	51,936	51,936	139,745	(87,809)	end of 13		
end of 14 end of 15	86 87	3,025,178 3,115,934	0	50,070 50,075	0	3,075,248 3,166,008	0	53,079 54,247	53,079 54,247	139,745 139,745	(86,667) (85,499)	end of 14 end of 15		
end of 15 end of 16	88	3,113,934	0	50,075	0	3,166,008	0	55,440	55,440	139,745	(84,305)	end of 15 end of 16		
end of 17	89	3,305,694	0	50,085	0	3,355,779	0	56,660	56,660	139,745	(83,086)	end of 17		
end of 18	90	3,404,864	0	50,090	0	3,454,954	0	57,906	57,906	139,745	(81,839)	end of 18		
end of 19	91	3,507,010	0	50,095	0	3,557,105	0	59,180	59,180	139,745	(80,565)	end of 19		
	92	3,612,220	0	50,100	0	3,662,320	0	60,482	60,482	139,745	(79,263)	end of 20		
end of 20			0		0		0	991,487	991,487		(1,722,720)			

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.