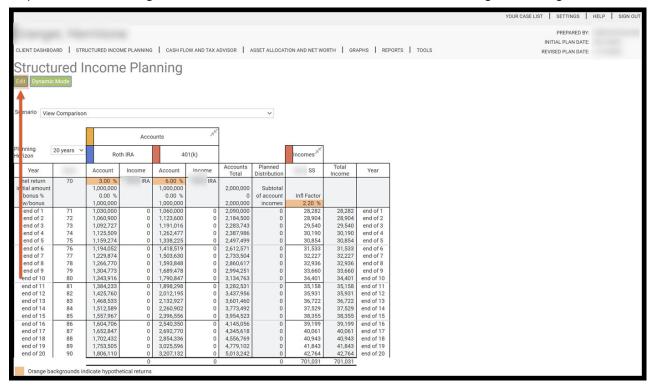
## **View Comparison Function**

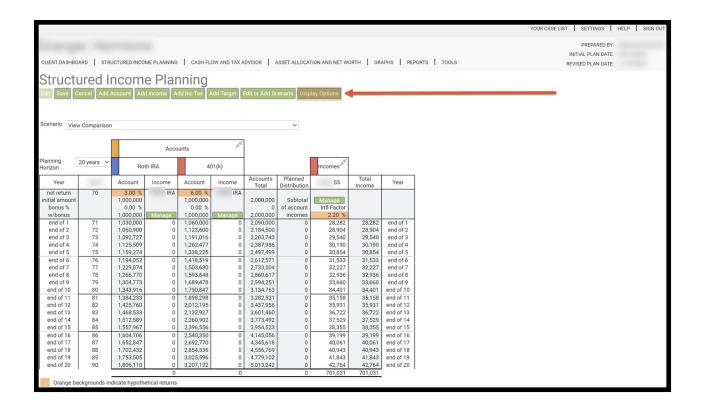
11/22/2024 11:34 am EST

On the structured income planning page, you can view hypothetical series of returns based on the total amount of assets someone has started out with. This function is available through the display options. Below is a step-by-step guideline for viewing comparison rates.

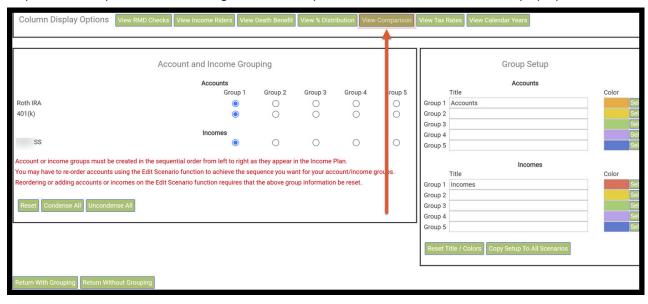
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



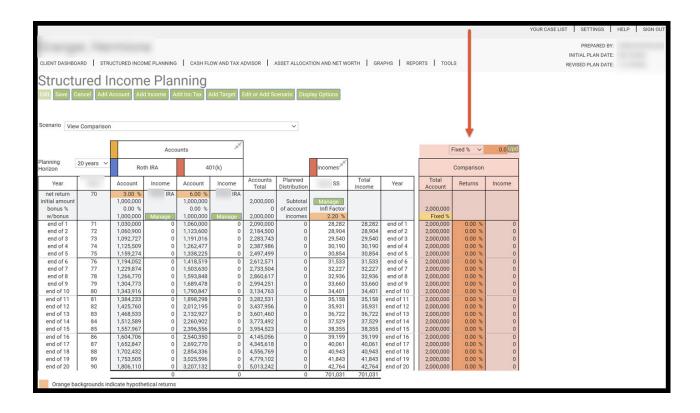
Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning subheading.



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

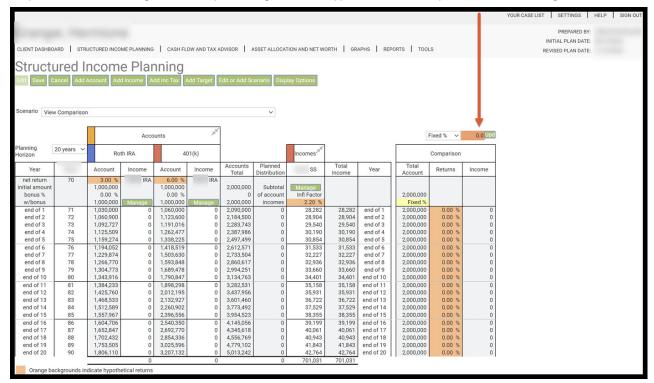


Step 4: Structured Income Planning Page: A new comparison table will appear on the Structured Income Planning Page.

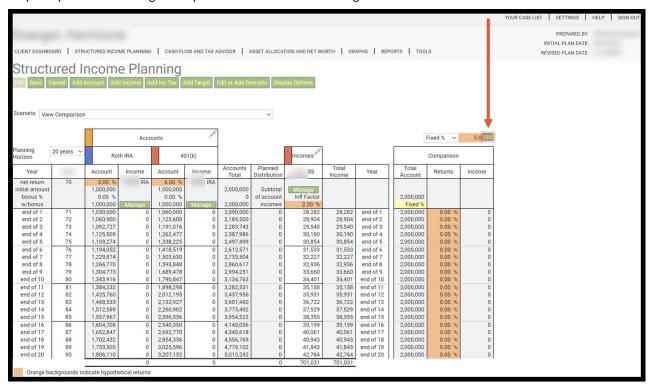


## Option A: Fixed %:

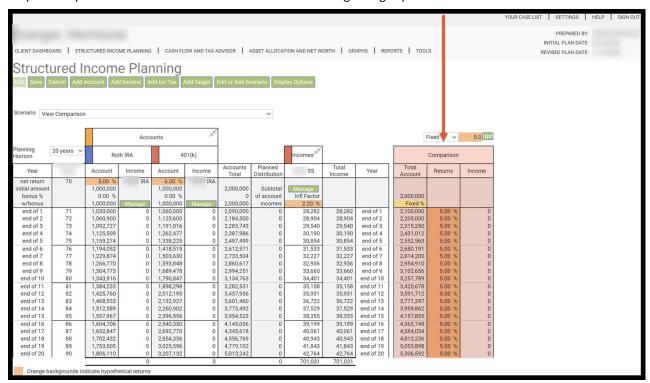
Step 5: Fixed %: To change the Fixed percentage number, type in the monetary amount in the orange box. (5%)



Step 6: Upd: Click on the green Upd text box to make the changes.

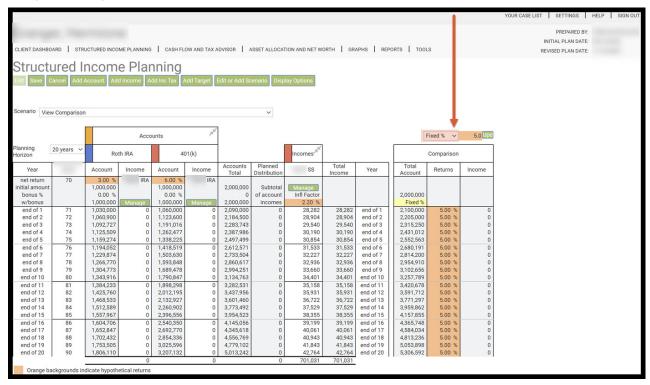


Step 7: Comparison Table: The table should reflect the editing changes you have made.

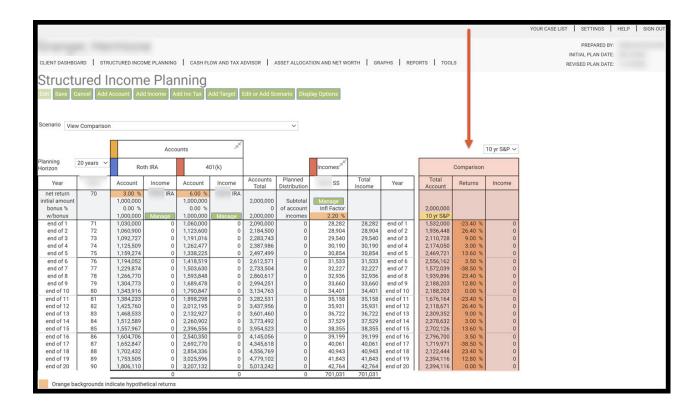


Option B: 10 yr S&P (2001-2011): If you would like the assets to repeat the growth rate that the S&P happened between 2001-2011, pick this option.

Step 8: Dropdown carrot arrow: Click on the drop-down carrot arrow in the Comparison text box and select 10yr S&P (2001-2011).

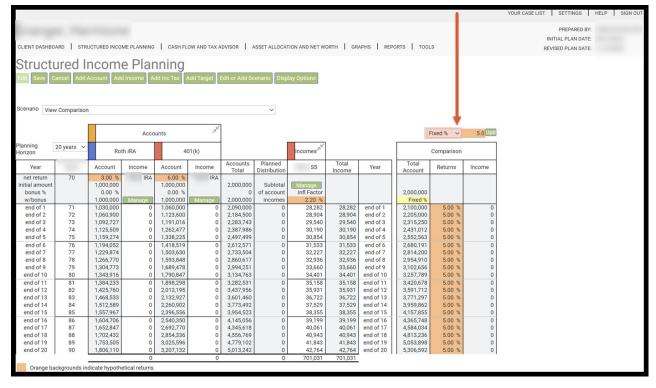


Step 9: Comparison Table: The table should reflect the editing changes you have made.



Option C: Lucky: If you would like to hypothetically see how the assets will do in the future is the assets are doing well.

Step 10: Dropdown carrot arrow: Click on the drop-down carrot arrow in the Comparison text box and select Lucky.

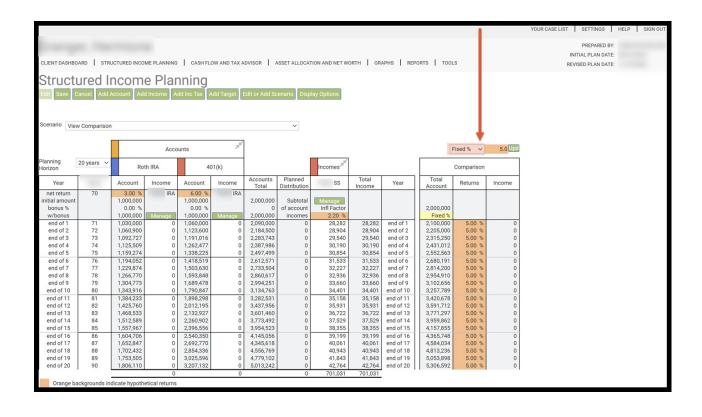


INITIAL PLAN DATE: LIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS REVISED PLAN DATE: Structured Income Planning dit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options anning orizon 20 years V Roth IRA 401(k) Comparison Total Income Accounts Total Returns Account Year Income 3.00 % 1,000,000 0.00 % 1,000,000 1,030,000 1,060,900 1,159,274 1,255,509 1,159,274 1,266,770 1,344,293 1,344,293 1,425,760 1,468,533 1,512,589 1,557,967 1,604,706 1,652,847 6.00 % 1,000,000 0,000 % 1,123,600 1,123,600 1,123,600 1,124,1418,519 1,503,630 1,593,848 1,790,847 2,260,902 2,396,556 2,540,350 2,692,770 2,854,336 3,025,596 2,071,359 2,000,000 2,090,000 2,184,500 2,497,499 2,497,499 2,612,571 2,733,504 2,860,617 2,994,251 3,134,763 3,282,531 3,437,956 4,345,618 4,556,769 4,345,618 4,556,769 4,779,102 5,013,242 1,806,000 2,073,288 2,431,967 2,466,014 3,114,576 3,540,690 4,092,136 5,209,289 6,421,625 6,421,625 6,877,560 9,222,808 11,095,038 11,095,038 14,534,499 18,415,210 22,006,174 19,717,532 17,1754,252 end of 1 end of 2 end of 3 end of 4 end of 5 end of 6 end of 7 end of 8 end of 9 end of 10 end of 11 end of 12 end of 13 end of 14 end of 15 end of 16 end of 17 end of 17 end of 18 end of 19 end of 19 end of 19 end of 10 28,282 28,904 29,540 30,190 30,854 31,533 32,227 32,936 33,660 34,401 35,158 35,931 36,722 37,529 38,355 39,199 40,061 40,943 41,843 end of 1 end of 2 end of 3 end of 4 end of 5 end of 6 end of 7 end of 8 end of 9 end of 10 end of 11 end of 11 end of 13 end of 15 end of 15 end of 16 end of 17 end of 17 end of 18 end of 19 end of 19 end of 10 end of 11 end of 12 end of 13 end of 19 end of 12 end of 13 end of 19 end of 12 end of 13 end of 19 end of 12 end of 13 end of 19 end of 19 end of 10 end of 10 end of 10 end of 15 end of 15 end of 16 end of 17 end of 18 end of 19 end of 19 end of 10 71 72 73 74 75 76 77 78 80 81 82 83 84 85 86 87 88 89 90 38,355 39,199 40,061 40,943 41,843 1,702,432 1,753,505 1,806,110

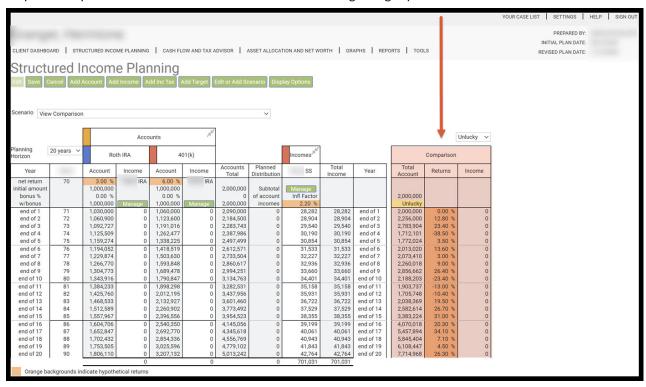
Step 11: Comparison Table: The table should reflect the editing changes you have made.

Option D: Unlucky: If you would like to hypothetically see how the assets will do in the future is the assets are not doing well.

Step 12: Dropdown carrot arrow: Click on the drop-down carrot arrow in the Comparison text box and select Unlucky.

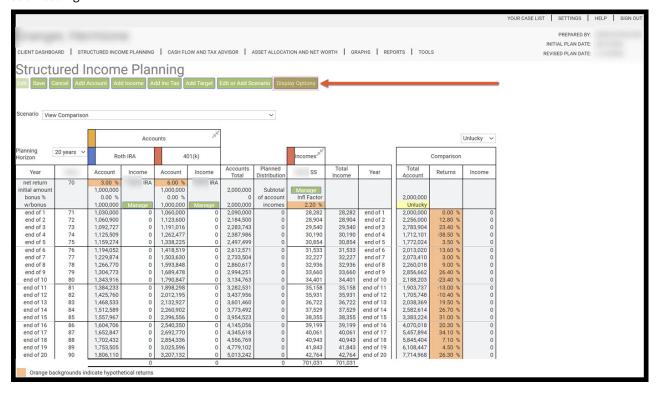


Step 13: Comparison Table: The table should reflect the editing changes you have made.

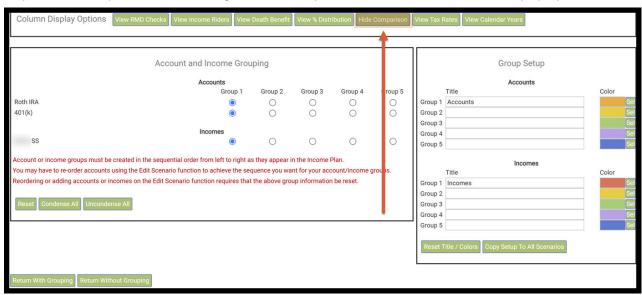


Step 14: Display Options: Click on the green Display Option button underneath the Structured Income Planning

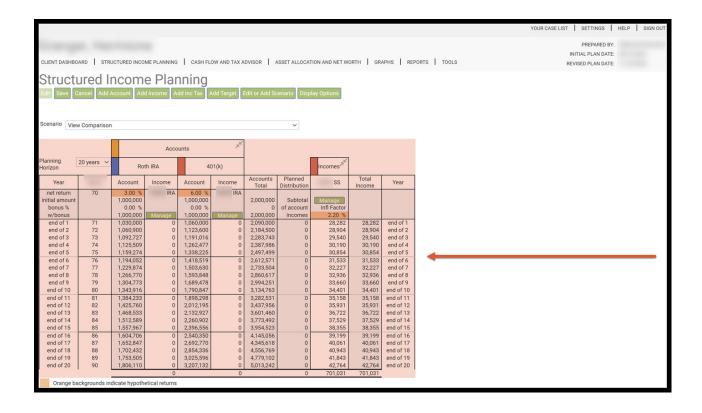
## sub-heading.



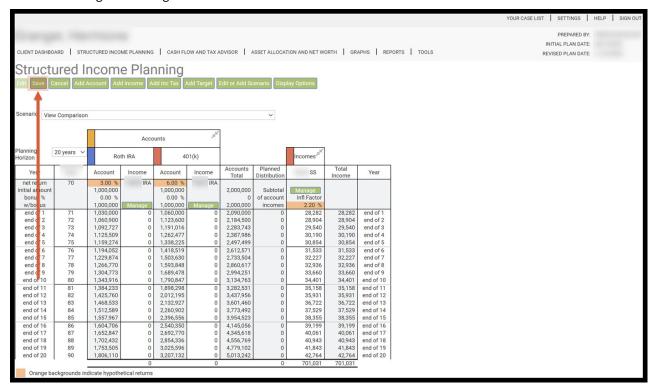
Step 15: Hide Comparison: Click on the green Hide Comparison button located in Column Display Options Table.



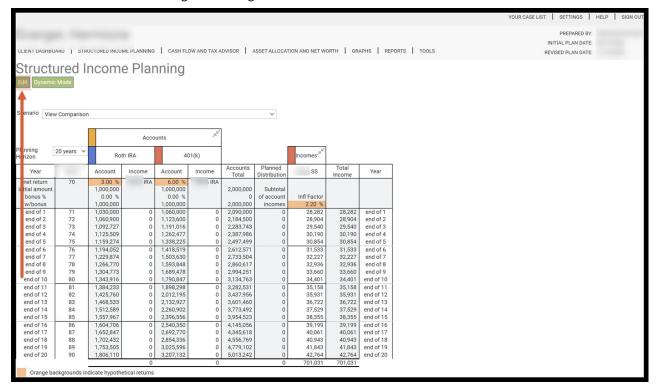
Step 16: Structured Income Planning Page: The Comparison Table will be removed from the Structured Income Plan.



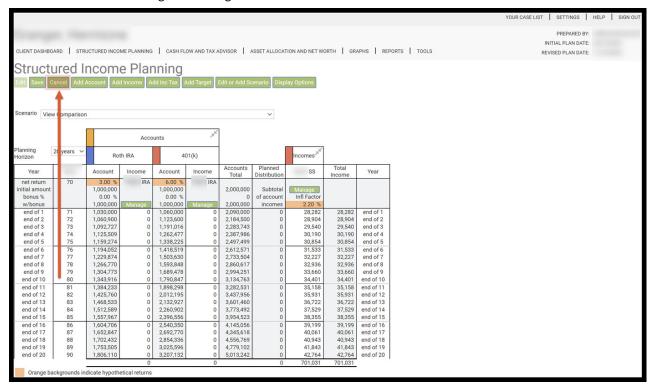
Step 17: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



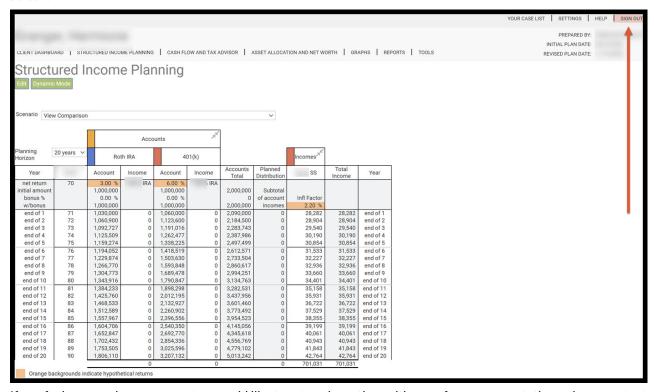
Step 18: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 19: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 20: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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.