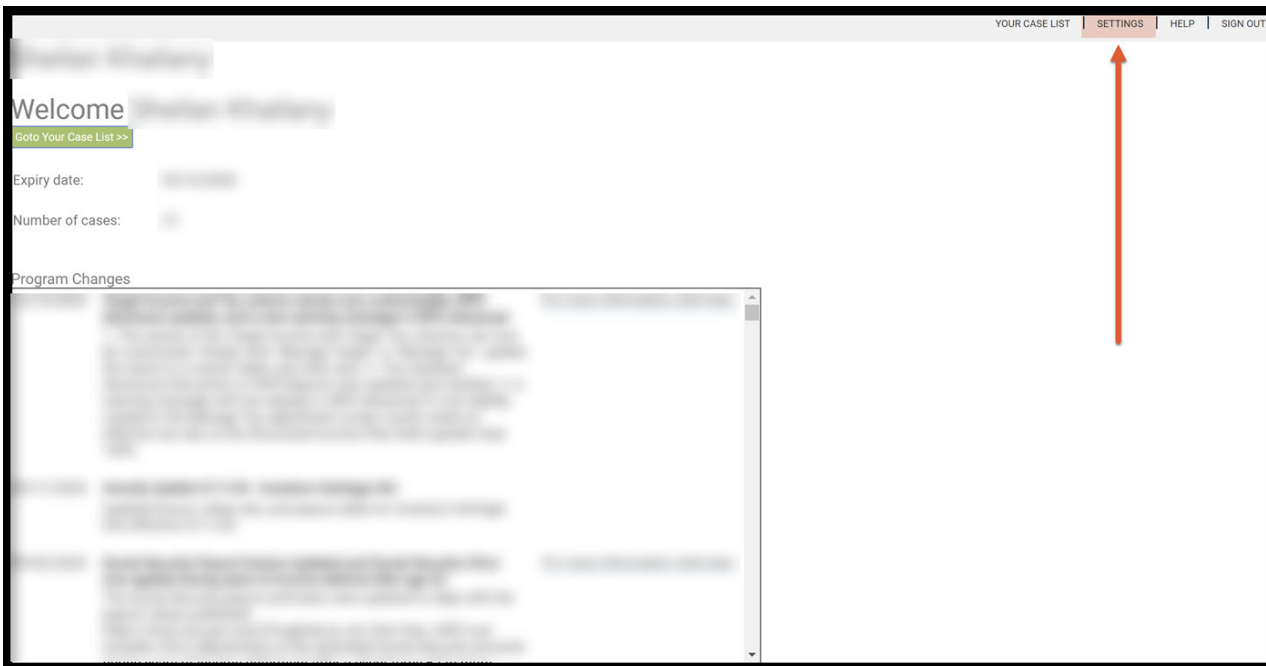


# Creating Custom Rate Returns for the View Comparison Table

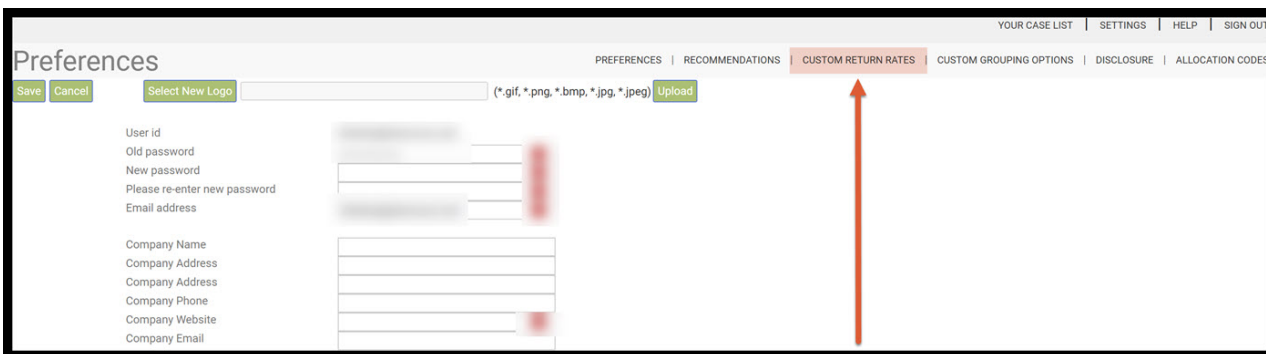
11/22/2024 11:38 am EST

Within the Comparison Table you can create your own custom rate returns. Below is a step-by-step guideline for creating custom rate returns for the Comparison Table on the Structured Income Planning Page.

Step 1: Settings: Click on the Settings Heading that is located in the upper right-hand side of the screen.



Step 2: Custom Rate Returns: Click on the Custom Rate Returns heading.



Step 3: Custom Rate Return 1: Filter in the numeric data you would like to use.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

### Custom Return Rates

Save Cancel

**Custom Return Rate 1**

Return Year	Rate %
1	0.0000 %
2	0.0000 %
3	0.0000 %
4	0.0000 %
5	0.0000 %
6	0.0000 %
7	0.0000 %
8	0.0000 %
9	0.0000 %
10	0.0000 %
11	0.0000 %
12	0.0000 %
13	0.0000 %
14	0.0000 %
15	0.0000 %
16	0.0000 %
17	0.0000 %
18	0.0000 %
19	0.0000 %
20	0.0000 %

**Custom Return Rate 2**

Return Year	Rate %
1	0.0000 %
2	0.0000 %
3	0.0000 %
4	0.0000 %
5	0.0000 %
6	0.0000 %
7	0.0000 %
8	0.0000 %
9	0.0000 %
10	0.0000 %
11	0.0000 %
12	0.0000 %
13	0.0000 %
14	0.0000 %
15	0.0000 %
16	0.0000 %
17	0.0000 %
18	0.0000 %
19	0.0000 %
20	0.0000 %

Step 4: Custom Rate Return 2: Filter in the numeric data you would like to use.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

### Custom Return Rates

Save Cancel

**Custom Return Rate 1**

Return Year	Rate %
1	10 %
2	9 %
3	8 %
4	7 %
5	6 %
6	5 %
7	4 %
8	3 %
9	2 %
10	1 %
11	0 %
12	-1 %
13	-2 %
14	-3 %
15	-4 %
16	-5 %
17	-6 %
18	-7 %
19	-8 %
20	-9 %
21	-10 %
22	0.0000 %

**Custom Return Rate 2**

Return Year	Rate %
1	0.0000 %
2	0.0000 %
3	0.0000 %
4	0.0000 %
5	0.0000 %
6	0.0000 %
7	0.0000 %
8	0.0000 %
9	0.0000 %
10	0.0000 %
11	0.0000 %
12	0.0000 %
13	0.0000 %
14	0.0000 %
15	0.0000 %
16	0.0000 %
17	0.0000 %
18	0.0000 %
19	0.0000 %
20	0.0000 %
21	0.0000 %
22	0.0000 %

Step 5: Save: Click on the green Save button underneath the Custom Rate Returns heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Custom Return Rates

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

Save Cancel

**Custom Return Rate 1**

Return Year	Rate %
1	10 %
2	9 %
3	8 %
4	7 %
5	6 %
6	5 %
7	4 %
8	3 %
9	2 %
10	1 %
11	0 %
12	-1 %
13	-2 %
14	-3 %
15	-4 %
16	-5 %
17	-6 %
18	-7 %
19	-8 %
20	-9 %
21	-10 %
22	0.0000 %

**Custom Return Rate 2**

Return Year	Rate %
1	-10 %
2	-9 %
3	-8 %
4	-7 %
5	-6 %
6	-5 %
7	-4 %
8	-3 %
9	-2 %
10	-1 %
11	0 %
12	1 %
13	2 %
14	3 %
15	4 %
16	5 %
17	6 %
18	7 %
19	8 %
20	9 %
21	10 %
22	0.0000 %

Step 6: Your Case List: Click on Your Case List heading that is located in the upper right-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Custom Return Rates

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

Save Cancel

**Custom Return Rate 1**

Return Year	Rate %
1	10 %
2	9 %
3	8 %
4	7 %
5	6 %
6	5 %
7	4 %
8	3 %
9	2 %
10	1 %
11	0 %
12	-1 %
13	-2 %
14	-3 %
15	-4 %
16	-5 %
17	-6 %
18	-7 %
19	-8 %
20	-9 %
21	-10 %
22	0.0000 %

**Custom Return Rate 2**

Return Year	Rate %
1	-10 %
2	-9 %
3	-8 %
4	-7 %
5	-6 %
6	-5 %
7	-4 %
8	-3 %
9	-2 %
10	-1 %
11	0 %
12	1 %
13	2 %
14	3 %
15	4 %
16	5 %
17	6 %
18	7 %
19	8 %
20	9 %
21	10 %
22	0.0000 %

YOUR CASE LIST

Step 7: View All Cases: Click on the green View All Cases button located underneath the Your Case List heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Your Case List

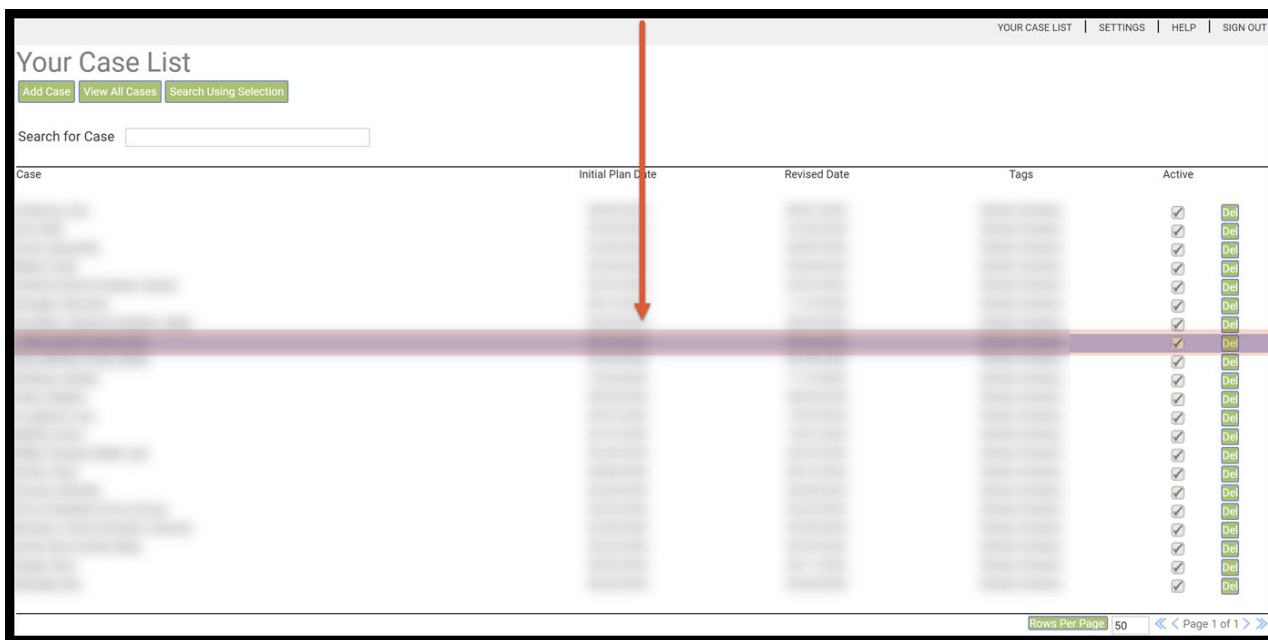
Add Case View All Cases Search Using Selection

Search for Case

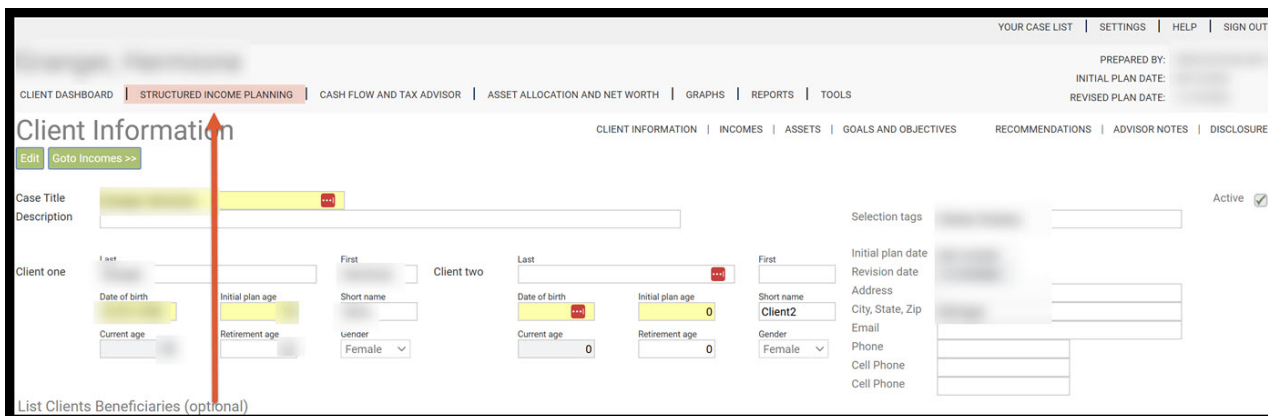
Case	Initial Plan Date	Revised Date	Tags	Active
Please use View All Cases or Search Using Selection to view one or more cases				

Rows Per Page 50 << No records >>

Step 8: Case Selection: Selection which case you would like to open up.



Step 9: Structured Income Plan: Click on the Structured Income Plan heading underneath the Clients name heading.



Step 10: Scenario: Using the drop-down carrot arrow select which scenario you would like to be in.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

Edit Dynamic Mode

Scenario View Comparison

Planning Horizon 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			SS	Infl Factor		
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	2.20 %			
initial amount		1,000,000		1,000,000	0					
bonus % w/bonus		0.00 %		0.00 %	2,000,000					
end of 1	71	1,030,000	0	1,060,000	2,090,000	0	28,282	28,282	end of 1	
end of 2	72	1,060,900	0	1,123,600	2,184,500	0	28,904	28,904	end of 2	
end of 3	73	1,092,727	0	1,191,016	2,283,743	0	29,540	29,540	end of 3	
end of 4	74	1,125,509	0	1,262,477	2,387,986	0	30,190	30,190	end of 4	
end of 5	75	1,159,274	0	1,338,225	2,497,499	0	30,854	30,854	end of 5	
end of 6	76	1,194,052	0	1,418,519	2,612,571	0	31,533	31,533	end of 6	
end of 7	77	1,229,874	0	1,503,630	2,733,504	0	32,227	32,227	end of 7	
end of 8	78	1,266,770	0	1,593,848	2,860,617	0	32,936	32,936	end of 8	
end of 9	79	1,304,773	0	1,689,478	2,994,251	0	33,660	33,660	end of 9	
end of 10	80	1,343,916	0	1,790,847	3,134,763	0	34,401	34,401	end of 10	
end of 11	81	1,384,233	0	1,898,298	3,282,531	0	35,158	35,158	end of 11	
end of 12	82	1,425,760	0	2,012,195	3,437,956	0	35,931	35,931	end of 12	
end of 13	83	1,468,533	0	2,132,927	3,601,460	0	36,722	36,722	end of 13	
end of 14	84	1,512,589	0	2,260,902	3,773,492	0	37,529	37,529	end of 14	
end of 15	85	1,557,967	0	2,396,556	3,954,523	0	38,355	38,355	end of 15	
end of 16	86	1,604,706	0	2,540,350	4,145,056	0	39,199	39,199	end of 16	
end of 17	87	1,652,847	0	2,692,770	4,345,618	0	40,061	40,061	end of 17	
end of 18	88	1,702,432	0	2,854,336	4,556,769	0	40,943	40,943	end of 18	
end of 19	89	1,753,505	0	3,025,596	4,779,102	0	41,843	41,843	end of 19	
end of 20	90	1,806,110	0	3,207,132	5,013,242	0	42,764	42,764	end of 20	
		0		0	0		701,031	701,031		

Orange backgrounds indicate hypothetical returns

Step 11: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

Edit Dynamic Mode

Scenario View Comparison

Planning Horizon 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			SS	Infl Factor		
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	2.20 %			
initial amount		1,000,000		1,000,000	0					
bonus % w/bonus		0.00 %		0.00 %	2,000,000					
end of 1	71	1,030,000	0	1,060,000	2,090,000	0	28,282	28,282	end of 1	
end of 2	72	1,060,900	0	1,123,600	2,184,500	0	28,904	28,904	end of 2	
end of 3	73	1,092,727	0	1,191,016	2,283,743	0	29,540	29,540	end of 3	
end of 4	74	1,125,509	0	1,262,477	2,387,986	0	30,190	30,190	end of 4	
end of 5	75	1,159,274	0	1,338,225	2,497,499	0	30,854	30,854	end of 5	
end of 6	76	1,194,052	0	1,418,519	2,612,571	0	31,533	31,533	end of 6	
end of 7	77	1,229,874	0	1,503,630	2,733,504	0	32,227	32,227	end of 7	
end of 8	78	1,266,770	0	1,593,848	2,860,617	0	32,936	32,936	end of 8	
end of 9	79	1,304,773	0	1,689,478	2,994,251	0	33,660	33,660	end of 9	
end of 10	80	1,343,916	0	1,790,847	3,134,763	0	34,401	34,401	end of 10	
end of 11	81	1,384,233	0	1,898,298	3,282,531	0	35,158	35,158	end of 11	
end of 12	82	1,425,760	0	2,012,195	3,437,956	0	35,931	35,931	end of 12	
end of 13	83	1,468,533	0	2,132,927	3,601,460	0	36,722	36,722	end of 13	
end of 14	84	1,512,589	0	2,260,902	3,773,492	0	37,529	37,529	end of 14	
end of 15	85	1,557,967	0	2,396,556	3,954,523	0	38,355	38,355	end of 15	
end of 16	86	1,604,706	0	2,540,350	4,145,056	0	39,199	39,199	end of 16	
end of 17	87	1,652,847	0	2,692,770	4,345,618	0	40,061	40,061	end of 17	
end of 18	88	1,702,432	0	2,854,336	4,556,769	0	40,943	40,943	end of 18	
end of 19	89	1,753,505	0	3,025,596	4,779,102	0	41,843	41,843	end of 19	
end of 20	90	1,806,110	0	3,207,132	5,013,242	0	42,764	42,764	end of 20	
		0		0	0		701,031	701,031		

Orange backgrounds indicate hypothetical returns

Step 12: 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: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

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

### Structured Income Planning

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

Scenario: View Comparison

Planning Horizon: 20 years

Year	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income					
net return	3.00 %		6.00 %						
initial amount	1,000,000		1,000,000		2,000,000				
bonus %	0.00 %		0.00 %		0				
w/bonus	1,000,000		1,000,000		2,000,000				
end of 1	1,030,000	0	1,060,000	0	2,090,000	0	28,282	28,282	end of 1
end of 2	1,060,900	0	1,123,600	0	2,184,500	0	28,904	28,904	end of 2
end of 3	1,092,727	0	1,191,016	0	2,283,743	0	29,540	29,540	end of 3
end of 4	1,125,509	0	1,262,477	0	2,387,986	0	30,190	30,190	end of 4
end of 5	1,159,274	0	1,338,225	0	2,497,499	0	30,854	30,854	end of 5
end of 6	1,194,052	0	1,418,519	0	2,612,571	0	31,533	31,533	end of 6
end of 7	1,229,874	0	1,503,630	0	2,733,504	0	32,227	32,227	end of 7
end of 8	1,266,770	0	1,593,848	0	2,860,617	0	32,936	32,936	end of 8
end of 9	1,304,773	0	1,689,478	0	2,994,251	0	33,660	33,660	end of 9
end of 10	1,343,916	0	1,790,847	0	3,134,763	0	34,401	34,401	end of 10
end of 11	1,384,233	0	1,898,298	0	3,282,531	0	35,158	35,158	end of 11
end of 12	1,425,760	0	2,012,195	0	3,437,956	0	35,931	35,931	end of 12
end of 13	1,468,533	0	2,132,927	0	3,601,460	0	36,722	36,722	end of 13
end of 14	1,512,589	0	2,260,902	0	3,773,492	0	37,529	37,529	end of 14
end of 15	1,557,967	0	2,396,556	0	3,954,523	0	38,355	38,355	end of 15
end of 16	1,604,706	0	2,540,350	0	4,145,056	0	39,199	39,199	end of 16
end of 17	1,652,847	0	2,692,770	0	4,345,618	0	40,061	40,061	end of 17
end of 18	1,702,432	0	2,854,336	0	4,556,769	0	40,943	40,943	end of 18
end of 19	1,753,505	0	3,025,596	0	4,779,102	0	41,843	41,843	end of 19
end of 20	1,806,110	0	3,207,132	0	5,013,242	0	42,764	42,764	end of 20
		0		0		0	701,031	701,031	

Orange backgrounds indicate hypothetical returns

Step 13: View Comparison: Click on the green View Comparison button located in 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: Roth IRA, 401(k), SS

Incomes: SS

Group 1 Group 2 Group 3 Group 4 Group 5

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: Accounts Color: [Set]

Group 2: [Set]

Group 3: [Set]

Group 4: [Set]

Group 5: [Set]

Incomes

Title: Incomes Color: [Set]

Group 2: [Set]

Group 3: [Set]

Group 4: [Set]

Group 5: [Set]

Reset Title / Colors Copy Setup To All Scenarios

Return With Grouping Return Without Grouping

Step 14: Structured Income Planning Page: A new comparison table will appear on the Structured Income Planning Page.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

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

Scenario: View Comparison

Planning Horizon: 20 years

Year	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year	Comparison		
	Account	Income	Account	Income						Total Account	Returns	Income
net return	3.00 %		6.00 %		2,000,000					2,000,000		
initial amount	1,000,000		1,000,000		2,000,000					2,000,000		
bonus %	0.00 %		0.00 %		0					0		
w/bonus	1,000,000		1,000,000		2,000,000					2,000,000		
end of 1	1,030,000	0	1,060,000	0	2,090,000	0	28,282	28,282	end of 1	2,000,000	0.00 %	0
end of 2	1,060,900	0	1,123,600	0	2,184,500	0	28,904	28,904	end of 2	2,000,000	0.00 %	0
end of 3	1,092,727	0	1,191,016	0	2,283,743	0	29,540	29,540	end of 3	2,000,000	0.00 %	0
end of 4	1,125,509	0	1,262,477	0	2,387,986	0	30,190	30,190	end of 4	2,000,000	0.00 %	0
end of 5	1,159,274	0	1,338,225	0	2,497,499	0	30,854	30,854	end of 5	2,000,000	0.00 %	0
end of 6	1,194,052	0	1,418,519	0	2,612,571	0	31,533	31,533	end of 6	2,000,000	0.00 %	0
end of 7	1,229,874	0	1,503,630	0	2,733,504	0	32,227	32,227	end of 7	2,000,000	0.00 %	0
end of 8	1,266,770	0	1,593,848	0	2,860,617	0	32,936	32,936	end of 8	2,000,000	0.00 %	0
end of 9	1,304,773	0	1,689,478	0	2,994,251	0	33,660	33,660	end of 9	2,000,000	0.00 %	0
end of 10	1,343,916	0	1,790,847	0	3,134,763	0	34,401	34,401	end of 10	2,000,000	0.00 %	0
end of 11	1,384,233	0	1,898,298	0	3,282,531	0	35,158	35,158	end of 11	2,000,000	0.00 %	0
end of 12	1,425,760	0	2,012,195	0	3,437,956	0	35,931	35,931	end of 12	2,000,000	0.00 %	0
end of 13	1,468,533	0	2,132,927	0	3,601,460	0	36,722	36,722	end of 13	2,000,000	0.00 %	0
end of 14	1,512,589	0	2,260,902	0	3,773,492	0	37,529	37,529	end of 14	2,000,000	0.00 %	0
end of 15	1,557,967	0	2,396,556	0	3,954,523	0	38,355	38,355	end of 15	2,000,000	0.00 %	0
end of 16	1,604,706	0	2,540,350	0	4,145,056	0	39,199	39,199	end of 16	2,000,000	0.00 %	0
end of 17	1,652,847	0	2,692,770	0	4,345,618	0	40,061	40,061	end of 17	2,000,000	0.00 %	0
end of 18	1,702,432	0	2,854,336	0	4,556,769	0	40,943	40,943	end of 18	2,000,000	0.00 %	0
end of 19	1,753,505	0	3,025,596	0	4,779,102	0	41,843	41,843	end of 19	2,000,000	0.00 %	0
end of 20	1,806,110	0	3,207,132	0	5,013,242	0	42,764	42,764	end of 20	2,000,000	0.00 %	0
		0		0		0	701,031	701,031				

Orange backgrounds indicate hypothetical returns

Step 15: Custom 1: Using the drop-down carrot arrow, select Custom 1.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

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

Scenario: View Comparison

Planning Horizon: 20 years

Year	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year	Comparison		
	Account	Income	Account	Income						Total Account	Returns	Income
net return	3.00 %		6.00 %		2,000,000					2,000,000		
initial amount	1,000,000		1,000,000		2,000,000					2,000,000		
bonus %	0.00 %		0.00 %		0					0		
w/bonus	1,000,000		1,000,000		2,000,000					2,000,000		
end of 1	1,030,000	0	1,060,000	0	2,090,000	0	28,282	28,282	end of 1	2,000,000	0.00 %	0
end of 2	1,060,900	0	1,123,600	0	2,184,500	0	28,904	28,904	end of 2	2,000,000	0.00 %	0
end of 3	1,092,727	0	1,191,016	0	2,283,743	0	29,540	29,540	end of 3	2,000,000	0.00 %	0
end of 4	1,125,509	0	1,262,477	0	2,387,986	0	30,190	30,190	end of 4	2,000,000	0.00 %	0
end of 5	1,159,274	0	1,338,225	0	2,497,499	0	30,854	30,854	end of 5	2,000,000	0.00 %	0
end of 6	1,194,052	0	1,418,519	0	2,612,571	0	31,533	31,533	end of 6	2,000,000	0.00 %	0
end of 7	1,229,874	0	1,503,630	0	2,733,504	0	32,227	32,227	end of 7	2,000,000	0.00 %	0
end of 8	1,266,770	0	1,593,848	0	2,860,617	0	32,936	32,936	end of 8	2,000,000	0.00 %	0
end of 9	1,304,773	0	1,689,478	0	2,994,251	0	33,660	33,660	end of 9	2,000,000	0.00 %	0
end of 10	1,343,916	0	1,790,847	0	3,134,763	0	34,401	34,401	end of 10	2,000,000	0.00 %	0
end of 11	1,384,233	0	1,898,298	0	3,282,531	0	35,158	35,158	end of 11	2,000,000	0.00 %	0
end of 12	1,425,760	0	2,012,195	0	3,437,956	0	35,931	35,931	end of 12	2,000,000	0.00 %	0
end of 13	1,468,533	0	2,132,927	0	3,601,460	0	36,722	36,722	end of 13	2,000,000	0.00 %	0
end of 14	1,512,589	0	2,260,902	0	3,773,492	0	37,529	37,529	end of 14	2,000,000	0.00 %	0
end of 15	1,557,967	0	2,396,556	0	3,954,523	0	38,355	38,355	end of 15	2,000,000	0.00 %	0
end of 16	1,604,706	0	2,540,350	0	4,145,056	0	39,199	39,199	end of 16	2,000,000	0.00 %	0
end of 17	1,652,847	0	2,692,770	0	4,345,618	0	40,061	40,061	end of 17	2,000,000	0.00 %	0
end of 18	1,702,432	0	2,854,336	0	4,556,769	0	40,943	40,943	end of 18	2,000,000	0.00 %	0
end of 19	1,753,505	0	3,025,596	0	4,779,102	0	41,843	41,843	end of 19	2,000,000	0.00 %	0
end of 20	1,806,110	0	3,207,132	0	5,013,242	0	42,764	42,764	end of 20	2,000,000	0.00 %	0
		0		0		0	701,031	701,031				

Orange backgrounds indicate hypothetical returns

Step 16: Structured Income Planning Page: The custom rates should be reflected in the Returns column.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

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

Scenario: View Comparison

Planning Horizon	Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year	Comparison		
		Account	Income	Account	Income			SS	Infl Factor			Total Account	Returns	Income
	net return	3.00 %		6.00 %		2,000,000	Subtotal of account incomes	Manage			2,000,000			
	initial amount	1,000,000		1,000,000		0		Infl Factor			2,000,000			
	bonus %	0.00 %		0.00 %		0					2,000,000			
	w/bonus	1,000,000	Manage	1,000,000	Manage	2,000,000		2.20 %			Custom1			
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	0	28,282	28,282	end of 1	2,200,000	10.00 %	0	
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	0	28,904	28,904	end of 2	2,398,000	9.00 %	0	
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	0	29,540	29,540	end of 3	2,589,840	8.00 %	0	
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	0	30,190	30,190	end of 4	2,771,129	7.00 %	0	
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	0	30,854	30,854	end of 5	2,937,396	6.00 %	0	
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	0	31,533	31,533	end of 6	3,084,266	5.00 %	0	
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	0	32,227	32,227	end of 7	3,207,637	4.00 %	0	
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	0	32,936	32,936	end of 8	3,303,866	3.00 %	0	
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	0	33,660	33,660	end of 9	3,369,943	2.00 %	0	
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	0	34,401	34,401	end of 10	3,403,642	1.00 %	0	
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	0	35,158	35,158	end of 11	3,403,642	0.00 %	0	
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	0	35,931	35,931	end of 12	3,369,606	-1.00 %	0	
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	0	36,722	36,722	end of 13	3,302,214	-2.00 %	0	
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	0	37,529	37,529	end of 14	3,203,148	-3.00 %	0	
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	0	38,355	38,355	end of 15	3,075,022	-4.00 %	0	
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	0	39,199	39,199	end of 16	2,921,271	-5.00 %	0	
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	0	40,061	40,061	end of 17	2,745,994	-6.00 %	0	
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	0	40,943	40,943	end of 18	2,553,775	-7.00 %	0	
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	0	41,843	41,843	end of 19	2,349,473	-8.00 %	0	
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	0	42,764	42,764	end of 20	2,138,020	-9.00 %	0	
								701,031	701,031					

Orange backgrounds indicate hypothetical returns

Step 17: Custom 2: Using the drop-down carrot arrow, select Custom 2.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

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

Scenario: View Comparison

Planning Horizon	Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year	Comparison		
		Account	Income	Account	Income			SS	Infl Factor			Total Account	Returns	Income
	net return	3.00 %		6.00 %		2,000,000	Subtotal of account incomes	Manage			2,000,000			
	initial amount	1,000,000		1,000,000		0		Infl Factor			2,000,000			
	bonus %	0.00 %		0.00 %		0					2,000,000			
	w/bonus	1,000,000	Manage	1,000,000	Manage	2,000,000		2.20 %			Custom1			
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	0	28,282	28,282	end of 1	2,200,000	10.00 %	0	
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	0	28,904	28,904	end of 2	2,398,000	9.00 %	0	
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	0	29,540	29,540	end of 3	2,589,840	8.00 %	0	
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	0	30,190	30,190	end of 4	2,771,129	7.00 %	0	
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	0	30,854	30,854	end of 5	2,937,396	6.00 %	0	
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	0	31,533	31,533	end of 6	3,084,266	5.00 %	0	
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	0	32,227	32,227	end of 7	3,207,637	4.00 %	0	
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	0	32,936	32,936	end of 8	3,303,866	3.00 %	0	
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	0	33,660	33,660	end of 9	3,369,943	2.00 %	0	
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	0	34,401	34,401	end of 10	3,403,642	1.00 %	0	
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	0	35,158	35,158	end of 11	3,403,642	0.00 %	0	
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	0	35,931	35,931	end of 12	3,369,606	-1.00 %	0	
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	0	36,722	36,722	end of 13	3,302,214	-2.00 %	0	
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	0	37,529	37,529	end of 14	3,203,148	-3.00 %	0	
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	0	38,355	38,355	end of 15	3,075,022	-4.00 %	0	
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	0	39,199	39,199	end of 16	2,921,271	-5.00 %	0	
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	0	40,061	40,061	end of 17	2,745,994	-6.00 %	0	
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	0	40,943	40,943	end of 18	2,553,775	-7.00 %	0	
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	0	41,843	41,843	end of 19	2,349,473	-8.00 %	0	
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	0	42,764	42,764	end of 20	2,138,020	-9.00 %	0	
								701,031	701,031					

Orange backgrounds indicate hypothetical returns

Step 18: Structured Income Planning Page: The custom rates should be reflected in the Returns 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 Comparison

Planning Horizon 20 years

Accounts Roth IRA 401(k)

Incomes SS

Comparison Custom2

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Manage Inff Factor 2.20 %			2,000,000	Custom2	
initial amount		1,000,000	1,000,000	1,000,000	2,000,000					2,000,000		
bonus %		0.00 %	0.00 %	0.00 %	0							
w/bonus		1,000,000	1,000,000	1,000,000	2,000,000							
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	28,282	28,282	end of 1	1,800,000	-10.00 %	0
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	28,904	28,904	end of 2	1,638,000	-9.00 %	0
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	29,540	29,540	end of 3	1,506,960	-8.00 %	0
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	30,190	30,190	end of 4	1,401,473	-7.00 %	0
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	30,854	30,854	end of 5	1,317,384	-6.00 %	0
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	31,533	31,533	end of 6	1,251,515	-5.00 %	0
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	32,227	32,227	end of 7	1,201,454	-4.00 %	0
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	32,936	32,936	end of 8	1,165,411	-3.00 %	0
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	33,660	33,660	end of 9	1,142,103	-2.00 %	0
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	34,401	34,401	end of 10	1,130,682	-1.00 %	0
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	35,158	35,158	end of 11	1,130,682	0.00 %	0
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	35,931	35,931	end of 12	1,141,988	1.00 %	0
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	36,722	36,722	end of 13	1,164,828	2.00 %	0
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	37,529	37,529	end of 14	1,199,773	3.00 %	0
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	38,355	38,355	end of 15	1,247,764	4.00 %	0
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	39,199	39,199	end of 16	1,310,152	5.00 %	0
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	40,061	40,061	end of 17	1,388,761	6.00 %	0
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	40,943	40,943	end of 18	1,485,974	7.00 %	0
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	41,843	41,843	end of 19	1,604,852	8.00 %	0
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	42,764	42,764	end of 20	1,749,289	9.00 %	0
		0	0	0	0	0	701,031	701,031				

Orange backgrounds indicate hypothetical returns

Step 19: 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 Comparison

Planning Horizon 20 years

Accounts Roth IRA 401(k)

Incomes SS

Comparison Custom2

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Manage Inff Factor 2.20 %			2,000,000	Custom2	
initial amount		1,000,000	1,000,000	1,000,000	2,000,000					2,000,000		
bonus %		0.00 %	0.00 %	0.00 %	0							
w/bonus		1,000,000	1,000,000	1,000,000	2,000,000							
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	28,282	28,282	end of 1	1,800,000	-10.00 %	0
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	28,904	28,904	end of 2	1,638,000	-9.00 %	0
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	29,540	29,540	end of 3	1,506,960	-8.00 %	0
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	30,190	30,190	end of 4	1,401,473	-7.00 %	0
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	30,854	30,854	end of 5	1,317,384	-6.00 %	0
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	31,533	31,533	end of 6	1,251,515	-5.00 %	0
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	32,227	32,227	end of 7	1,201,454	-4.00 %	0
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	32,936	32,936	end of 8	1,165,411	-3.00 %	0
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	33,660	33,660	end of 9	1,142,103	-2.00 %	0
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	34,401	34,401	end of 10	1,130,682	-1.00 %	0
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	35,158	35,158	end of 11	1,130,682	0.00 %	0
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	35,931	35,931	end of 12	1,141,988	1.00 %	0
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	36,722	36,722	end of 13	1,164,828	2.00 %	0
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	37,529	37,529	end of 14	1,199,773	3.00 %	0
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	38,355	38,355	end of 15	1,247,764	4.00 %	0
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	39,199	39,199	end of 16	1,310,152	5.00 %	0
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	40,061	40,061	end of 17	1,388,761	6.00 %	0
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	40,943	40,943	end of 18	1,485,974	7.00 %	0
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	41,843	41,843	end of 19	1,604,852	8.00 %	0
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	42,764	42,764	end of 20	1,749,289	9.00 %	0
		0	0	0	0	0	701,031	701,031				

Orange backgrounds indicate hypothetical returns

Step 20: Hide Comparison: Click on the green Hide Comparison button located in Column Display Options Table.

The screenshot shows the 'Column Display Options' menu at the top with 'Hide Comparison' highlighted by a red arrow. Below the menu are two main panels: 'Account and Income Grouping' and 'Group Setup'.

**Account and Income Grouping:** This panel shows a grid for assigning accounts and incomes to five groups. 'Roth IRA' and '401(k)' are assigned to Group 1. 'SS' is assigned to Group 1. A red text note states: "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." Buttons for 'Reset', 'Condense All', and 'Uncondense All' are present.

**Group Setup:** This panel allows for configuring the title and color for each of the five groups for both 'Accounts' and 'Incomes'. Buttons for 'Reset Title / Colors' and 'Copy Setup To All Scenarios' are at the bottom.

Step 21: Structured Income Planning Page: The Comparison Table will be removed from the Structured Income Plan.

The screenshot shows the 'Structured Income Planning' page. At the top, there are navigation links like 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', etc. Below the navigation is a toolbar with buttons like 'Edit', 'Save', 'Cancel', 'Add Account', etc. A dropdown menu shows 'View Comparison' as the selected scenario.

The main content is a table with columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Incomes', and 'Total Income'. The 'net return' row is highlighted with an orange background. A red arrow points to this row.

Year	Account	Income	Accounts Total	Planned Distribution	Incomes	Total Income	Year
70	3.00 %	6.00 %	2,000,000	0	0	0	
71	1,030,000	0	2,090,000	0	28,282	28,282	end of 1
72	1,060,900	0	2,184,500	0	28,904	28,904	end of 2
73	1,092,727	0	2,283,743	0	29,540	29,540	end of 3
74	1,125,509	0	2,387,986	0	30,190	30,190	end of 4
75	1,159,274	0	2,497,499	0	30,854	30,854	end of 5
76	1,194,052	0	2,612,571	0	31,533	31,533	end of 6
77	1,229,874	0	2,733,504	0	32,227	32,227	end of 7
78	1,266,770	0	2,860,617	0	32,936	32,936	end of 8
79	1,304,773	0	2,994,251	0	33,660	33,660	end of 9
80	1,343,916	0	3,134,763	0	34,401	34,401	end of 10
81	1,384,233	0	3,282,531	0	35,158	35,158	end of 11
82	1,425,760	0	3,437,956	0	35,931	35,931	end of 12
83	1,468,533	0	3,601,460	0	36,722	36,722	end of 13
84	1,512,589	0	3,773,492	0	37,529	37,529	end of 14
85	1,557,967	0	3,954,523	0	38,355	38,355	end of 15
86	1,604,706	0	4,145,056	0	39,199	39,199	end of 16
87	1,652,847	0	4,345,618	0	40,061	40,061	end of 17
88	1,702,432	0	4,556,769	0	40,943	40,943	end of 18
89	1,753,505	0	4,779,102	0	41,843	41,843	end of 19
90	1,806,110	0	5,013,242	0	42,764	42,764	end of 20
			0	0	701,031	701,031	

Orange backgrounds indicate hypothetical returns.

Step 22: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

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

Scenario: View Comparison

Planning Horizon: 20 years

Year	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income					
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Manage Infl Factor		
initial amount		1,000,000		1,000,000	0				
bonus % w/bonus		0.00 %		0.00 %	2,000,000		2.20 %		
		1,000,000	Manage	1,000,000	Manage				
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	28,282	28,282	end of 1
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	28,904	28,904	end of 2
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	29,540	29,540	end of 3
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	30,190	30,190	end of 4
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	30,854	30,854	end of 5
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	31,533	31,533	end of 6
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	32,227	32,227	end of 7
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	32,936	32,936	end of 8
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	33,660	33,660	end of 9
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	34,401	34,401	end of 10
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	35,158	35,158	end of 11
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	35,931	35,931	end of 12
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	36,722	36,722	end of 13
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	37,529	37,529	end of 14
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	38,355	38,355	end of 15
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	39,199	39,199	end of 16
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	40,061	40,061	end of 17
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	40,943	40,943	end of 18
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	41,843	41,843	end of 19
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	42,764	42,764	end of 20
			0	0	0	0	701,031	701,031	

Orange backgrounds indicate hypothetical returns

Step 23: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

## Structured Income Planning

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

Scenario: View Comparison

Planning Horizon: 20 years

Year	Roth IRA		401(k)		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income					
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Infl Factor		
initial amount		1,000,000		1,000,000	0				
bonus % w/bonus		0.00 %		0.00 %	2,000,000		2.20 %		
		1,000,000	Manage	1,000,000	Manage				
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	28,282	28,282	end of 1
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	28,904	28,904	end of 2
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	29,540	29,540	end of 3
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	30,190	30,190	end of 4
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	30,854	30,854	end of 5
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	31,533	31,533	end of 6
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	32,227	32,227	end of 7
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	32,936	32,936	end of 8
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	33,660	33,660	end of 9
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	34,401	34,401	end of 10
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	35,158	35,158	end of 11
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	35,931	35,931	end of 12
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	36,722	36,722	end of 13
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	37,529	37,529	end of 14
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	38,355	38,355	end of 15
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	39,199	39,199	end of 16
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	40,061	40,061	end of 17
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	40,943	40,943	end of 18
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	41,843	41,843	end of 19
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	42,764	42,764	end of 20
			0	0	0	0	701,031	701,031	

Orange backgrounds indicate hypothetical returns

Step 24: 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 View Comparison

Planning Horizon 2 years

Year	Accounts		Incomes		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income					
net return	70	3.00 %	IRA	6.00 %	2,000,000	0	2,000,000		
initial amount		1,000,000	IRA	1,000,000	0	0	0		
bonus %		0.00 %		0.00 %	0	0	0		
w/bonus		1,000,000	Manage	1,000,000	2,000,000	0	2,000,000		
end of 1	71	1,030,000	0	1,050,000	2,090,000	0	2,090,000	28,282	end of 1
end of 2	72	1,060,900	0	1,123,600	2,184,500	0	2,184,500	28,904	end of 2
end of 3	73	1,092,727	0	1,191,016	2,283,743	0	2,283,743	29,540	end of 3
end of 4	74	1,125,509	0	1,262,477	2,387,986	0	2,387,986	30,190	end of 4
end of 5	75	1,159,274	0	1,338,225	2,497,499	0	2,497,499	30,854	end of 5
end of 6	76	1,194,052	0	1,418,519	2,612,571	0	2,612,571	31,533	end of 6
end of 7	77	1,229,874	0	1,503,630	2,733,504	0	2,733,504	32,227	end of 7
end of 8	78	1,266,770	0	1,593,848	2,860,617	0	2,860,617	32,936	end of 8
end of 9	79	1,304,773	0	1,689,478	2,994,251	0	2,994,251	33,660	end of 9
end of 10	80	1,343,916	0	1,790,847	3,134,763	0	3,134,763	34,401	end of 10
end of 11	81	1,384,233	0	1,898,298	3,282,531	0	3,282,531	35,158	end of 11
end of 12	82	1,425,760	0	2,012,195	3,437,956	0	3,437,956	35,931	end of 12
end of 13	83	1,468,533	0	2,132,927	3,601,460	0	3,601,460	36,722	end of 13
end of 14	84	1,512,589	0	2,260,902	3,773,492	0	3,773,492	37,529	end of 14
end of 15	85	1,557,967	0	2,396,556	3,954,523	0	3,954,523	38,355	end of 15
end of 16	86	1,604,706	0	2,540,350	4,145,056	0	4,145,056	39,199	end of 16
end of 17	87	1,652,847	0	2,692,770	4,345,618	0	4,345,618	40,061	end of 17
end of 18	88	1,702,432	0	2,854,336	4,556,769	0	4,556,769	40,943	end of 18
end of 19	89	1,753,505	0	3,025,596	4,779,102	0	4,779,102	41,843	end of 19
end of 20	90	1,806,110	0	3,207,132	5,013,242	0	5,013,242	42,764	end of 20
		0	0	0	0	0	0	701,031	701,031

Orange backgrounds indicate hypothetical returns

Step 25: 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 View Comparison

Planning Horizon 20 years

Year	Accounts		Incomes		Accounts Total	Planned Distribution	SS	Total Income	Year
	Account	Income	Account	Income					
net return	70	3.00 %	IRA	6.00 %	2,000,000	0	2,000,000		
initial amount		1,000,000	IRA	1,000,000	0	0	0		
bonus %		0.00 %		0.00 %	0	0	0		
w/bonus		1,000,000	Manage	1,000,000	2,000,000	0	2,000,000		
end of 1	71	1,030,000	0	1,060,000	2,090,000	0	2,090,000	28,282	end of 1
end of 2	72	1,060,900	0	1,123,600	2,184,500	0	2,184,500	28,904	end of 2
end of 3	73	1,092,727	0	1,191,016	2,283,743	0	2,283,743	29,540	end of 3
end of 4	74	1,125,509	0	1,262,477	2,387,986	0	2,387,986	30,190	end of 4
end of 5	75	1,159,274	0	1,338,225	2,497,499	0	2,497,499	30,854	end of 5
end of 6	76	1,194,052	0	1,418,519	2,612,571	0	2,612,571	31,533	end of 6
end of 7	77	1,229,874	0	1,503,630	2,733,504	0	2,733,504	32,227	end of 7
end of 8	78	1,266,770	0	1,593,848	2,860,617	0	2,860,617	32,936	end of 8
end of 9	79	1,304,773	0	1,689,478	2,994,251	0	2,994,251	33,660	end of 9
end of 10	80	1,343,916	0	1,790,847	3,134,763	0	3,134,763	34,401	end of 10
end of 11	81	1,384,233	0	1,898,298	3,282,531	0	3,282,531	35,158	end of 11
end of 12	82	1,425,760	0	2,012,195	3,437,956	0	3,437,956	35,931	end of 12
end of 13	83	1,468,533	0	2,132,927	3,601,460	0	3,601,460	36,722	end of 13
end of 14	84	1,512,589	0	2,260,902	3,773,492	0	3,773,492	37,529	end of 14
end of 15	85	1,557,967	0	2,396,556	3,954,523	0	3,954,523	38,355	end of 15
end of 16	86	1,604,706	0	2,540,350	4,145,056	0	4,145,056	39,199	end of 16
end of 17	87	1,652,847	0	2,692,770	4,345,618	0	4,345,618	40,061	end of 17
end of 18	88	1,702,432	0	2,854,336	4,556,769	0	4,556,769	40,943	end of 18
end of 19	89	1,753,505	0	3,025,596	4,779,102	0	4,779,102	41,843	end of 19
end of 20	90	1,806,110	0	3,207,132	5,013,242	0	5,013,242	42,764	end of 20
		0	0	0	0	0	0	701,031	701,031

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: +1-888-449-6917 or [support@planscout.com](mailto:support@planscout.com).

