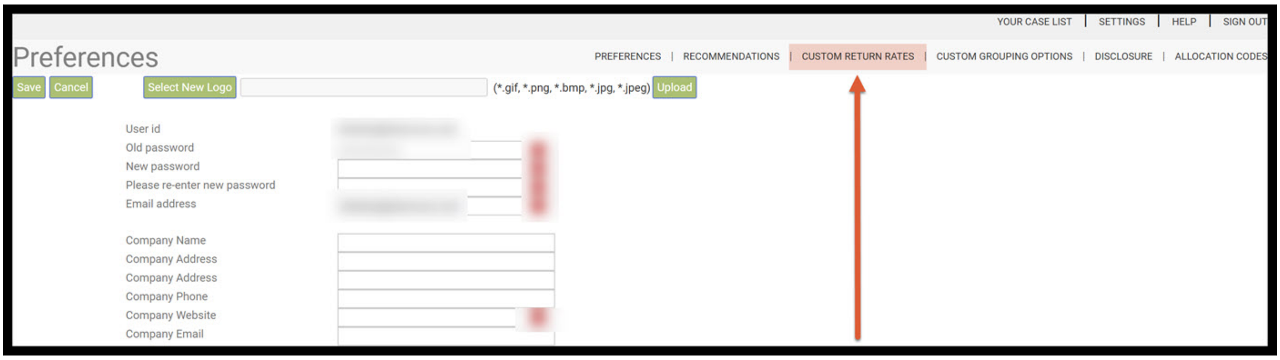
Creating Custom Rate Returns for the View Comparison Table

01/12/2026 11:18 am EST

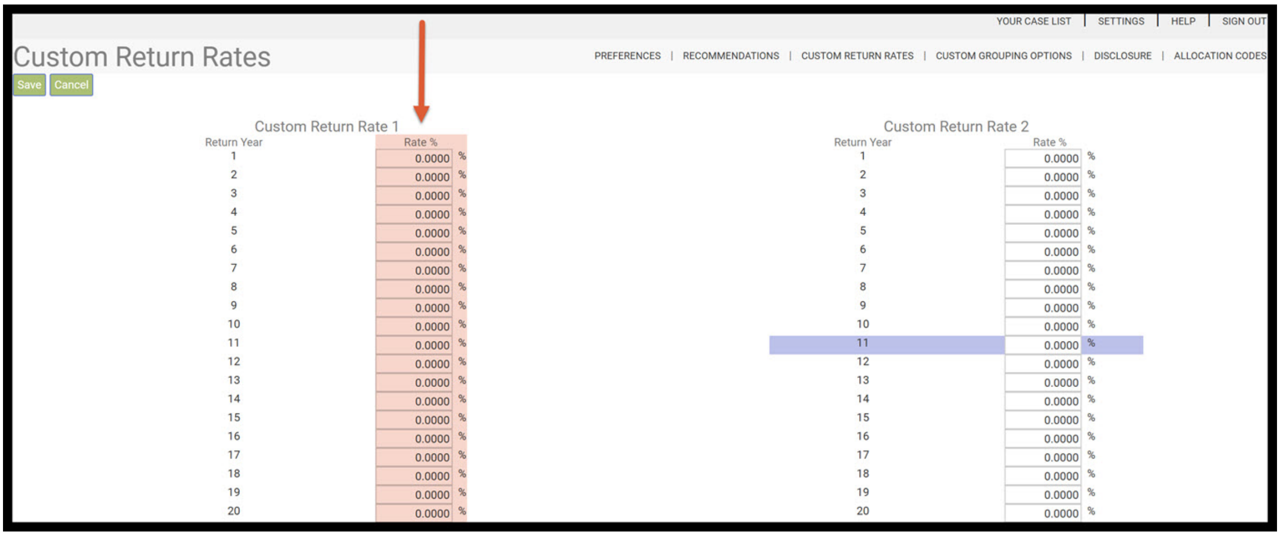
Within the Comparison Table you can create your own custom rate returns. Below is a step-by-step guideline for creating custom rate returns for the Comparison Table on the Structured Income Planning Page.

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

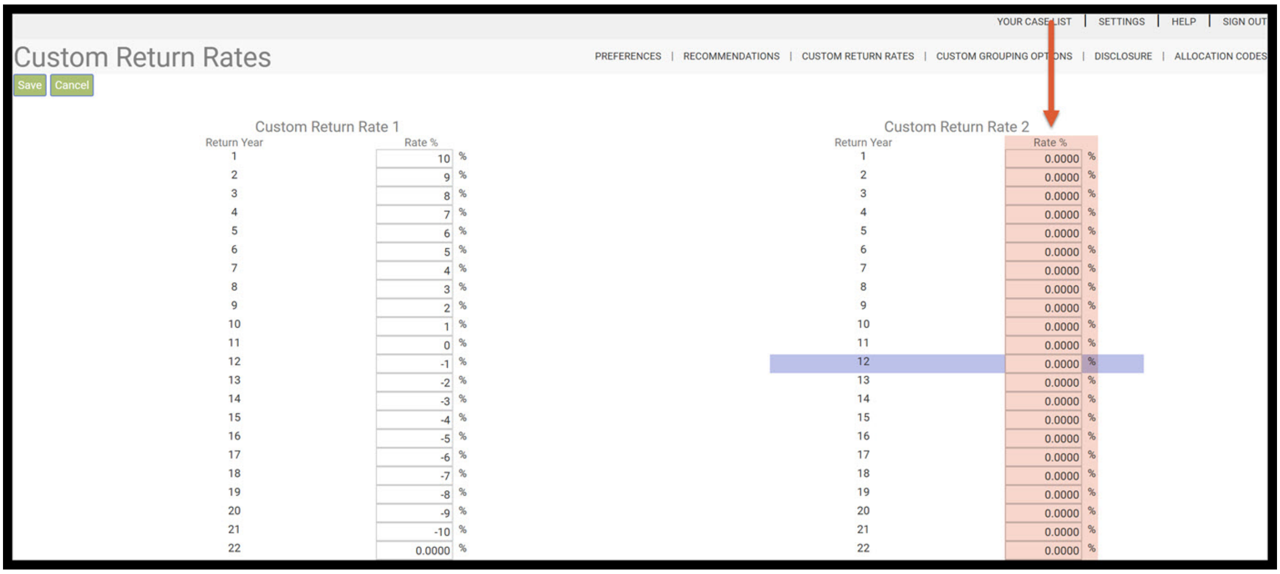
Step 2: Custom Rate Returns: Click on the Custom Rate Returns heading.



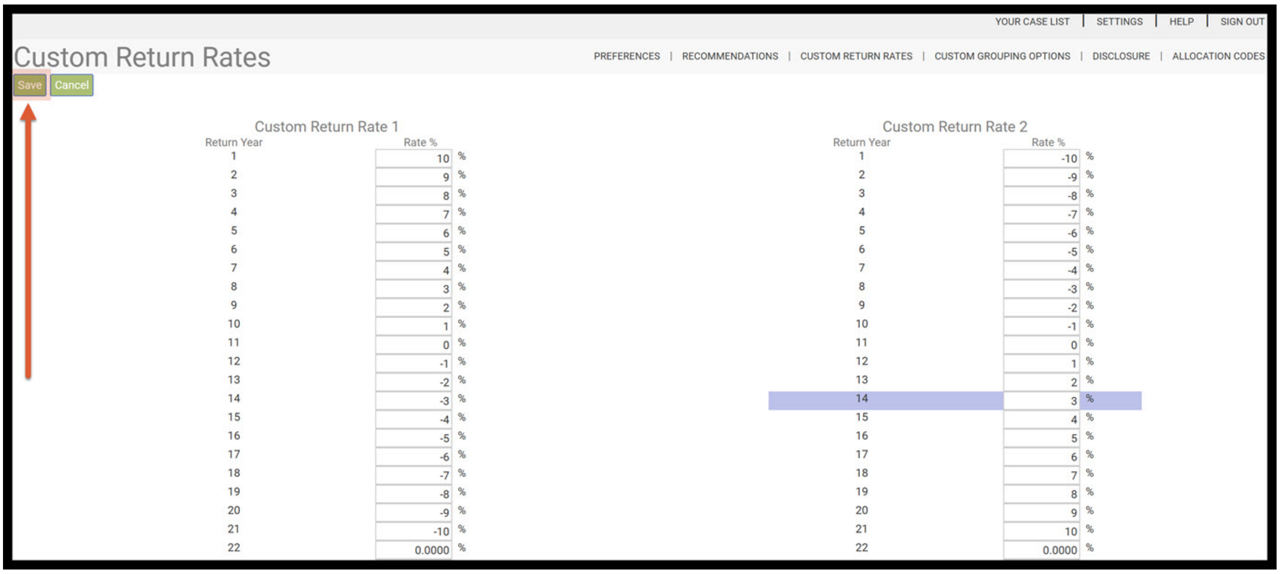
Step 3: Custom Rate Return 1: Filter in the numeric data you would like to use.



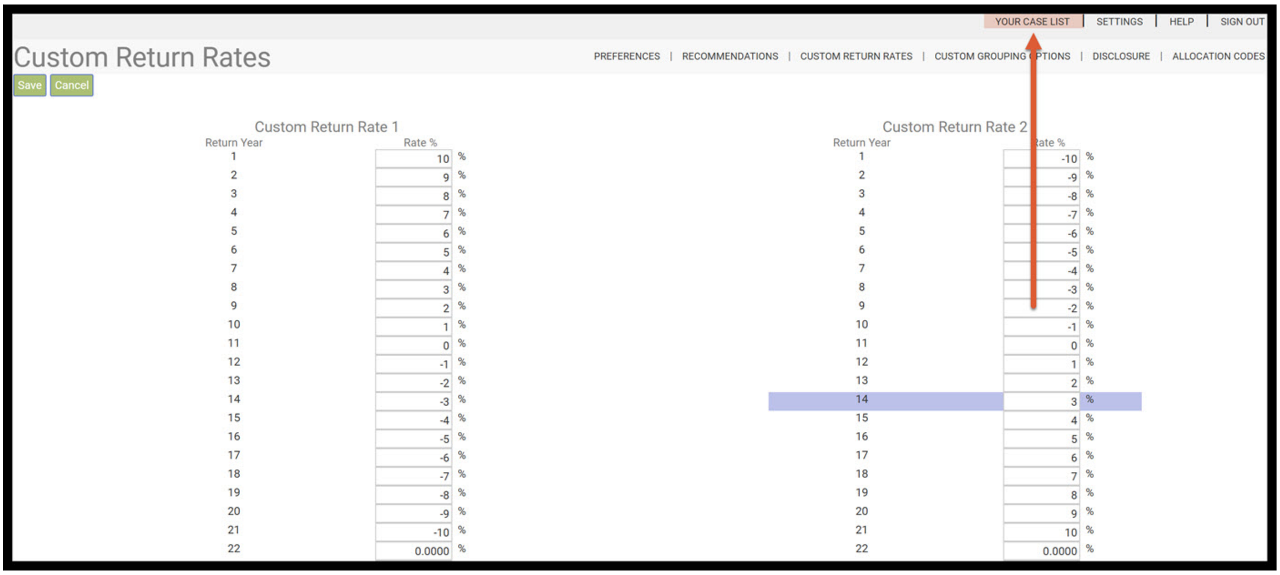
Step 4: Custom Rate Return 2: Filter in the numeric data you would like to use.



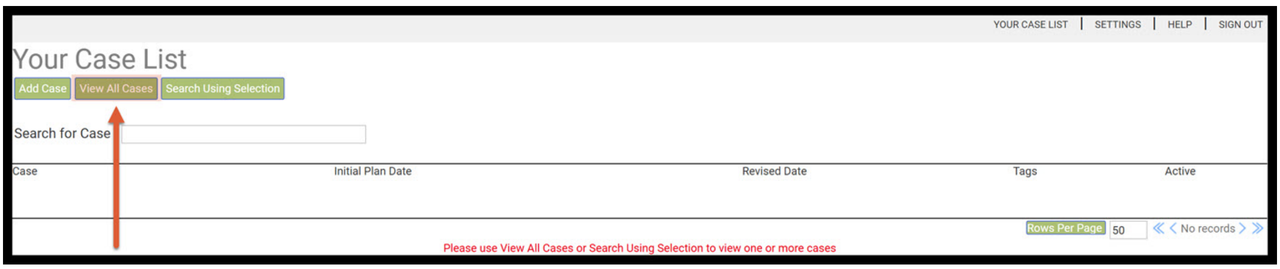
Step 5: Save: Click on the green Save button underneath the Custom Rate Returns heading.



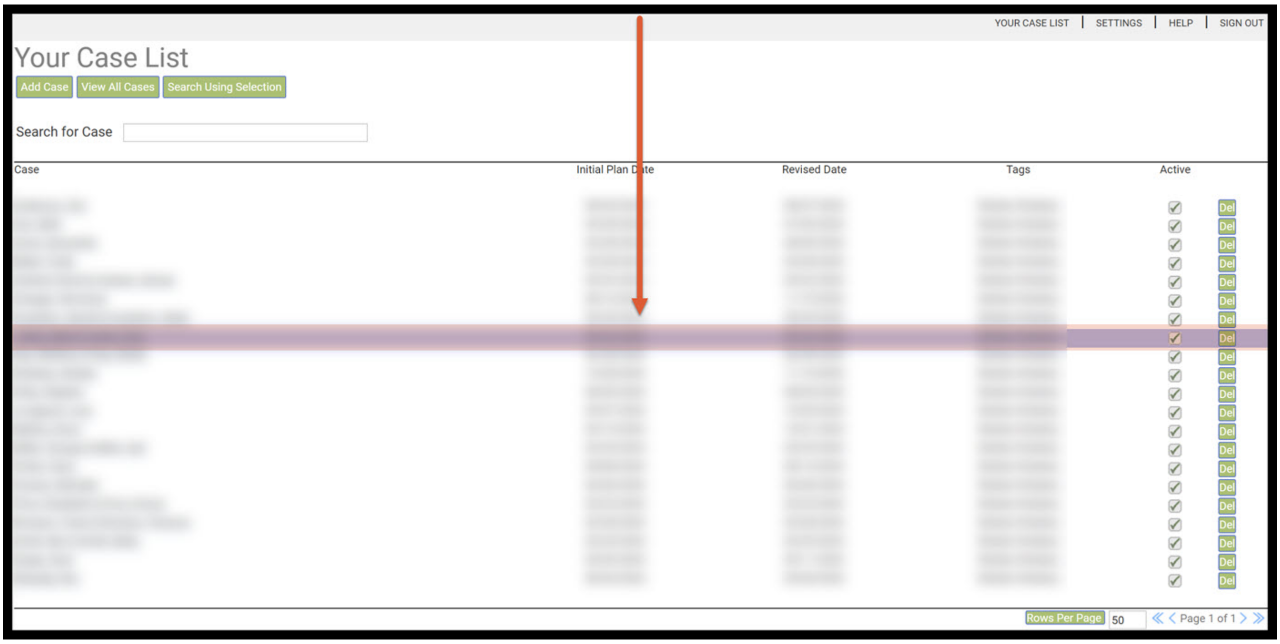
Step 6: Your Case List: Click on Your Case List heading that is located in the upper right-hand side of the screen.



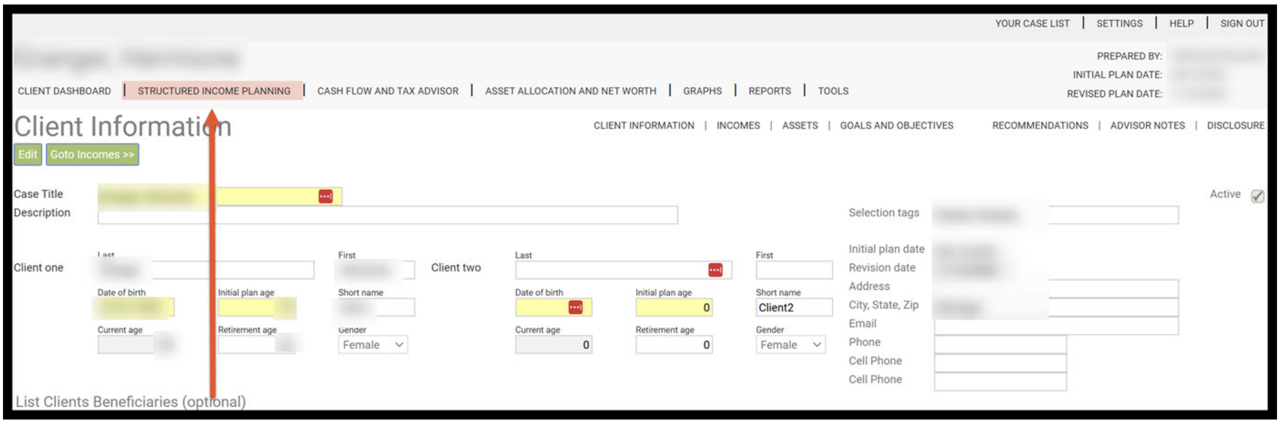
Step 7: View All Cases: Click on the green View All Cases button located underneath the Your Case List heading.



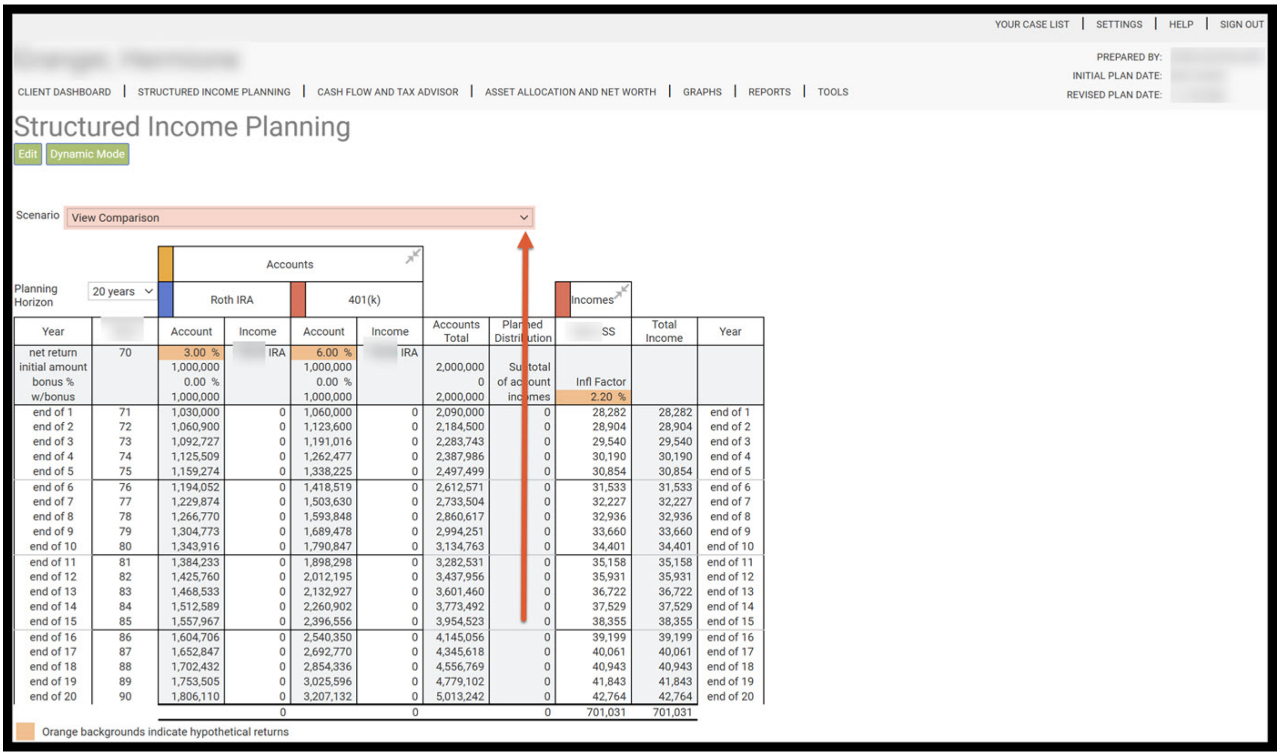
Step 8: Case Selection: Selection which case you would like to open up.



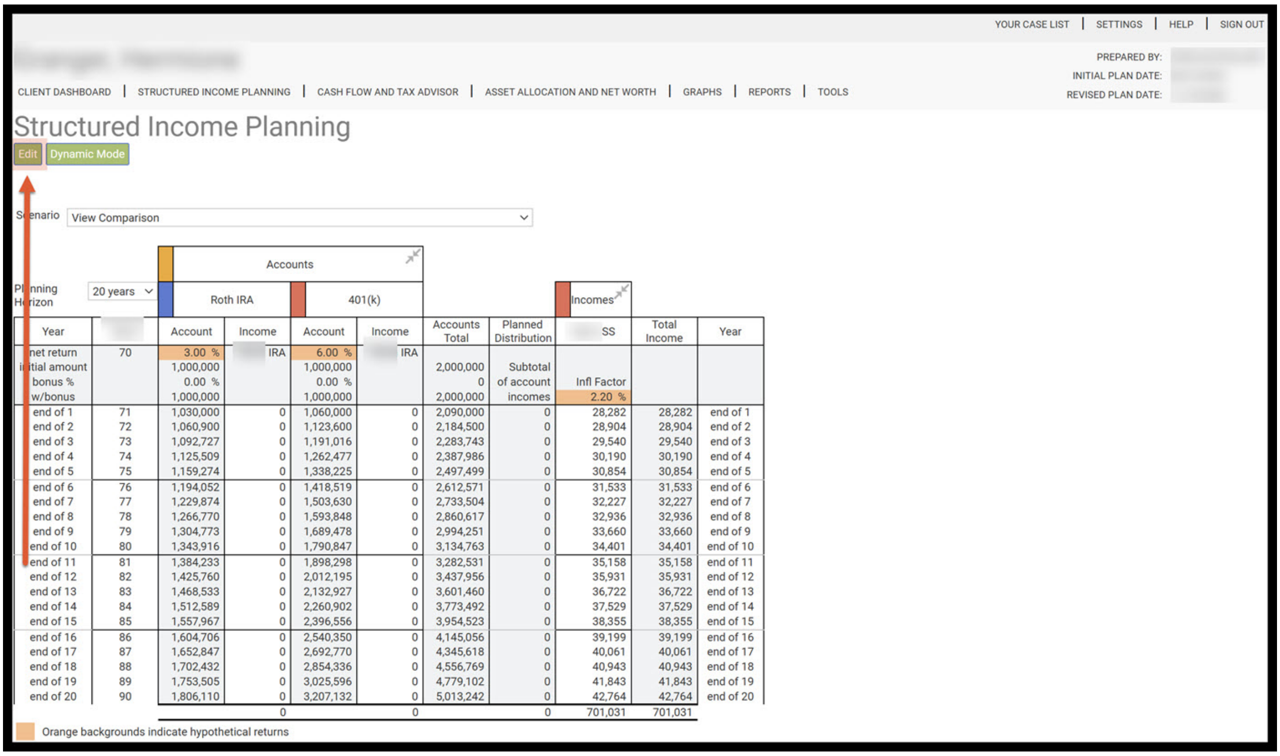
Step 9: Structured Income Plan: Click on the Structured Income Plan heading underneath the Clients name heading.



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



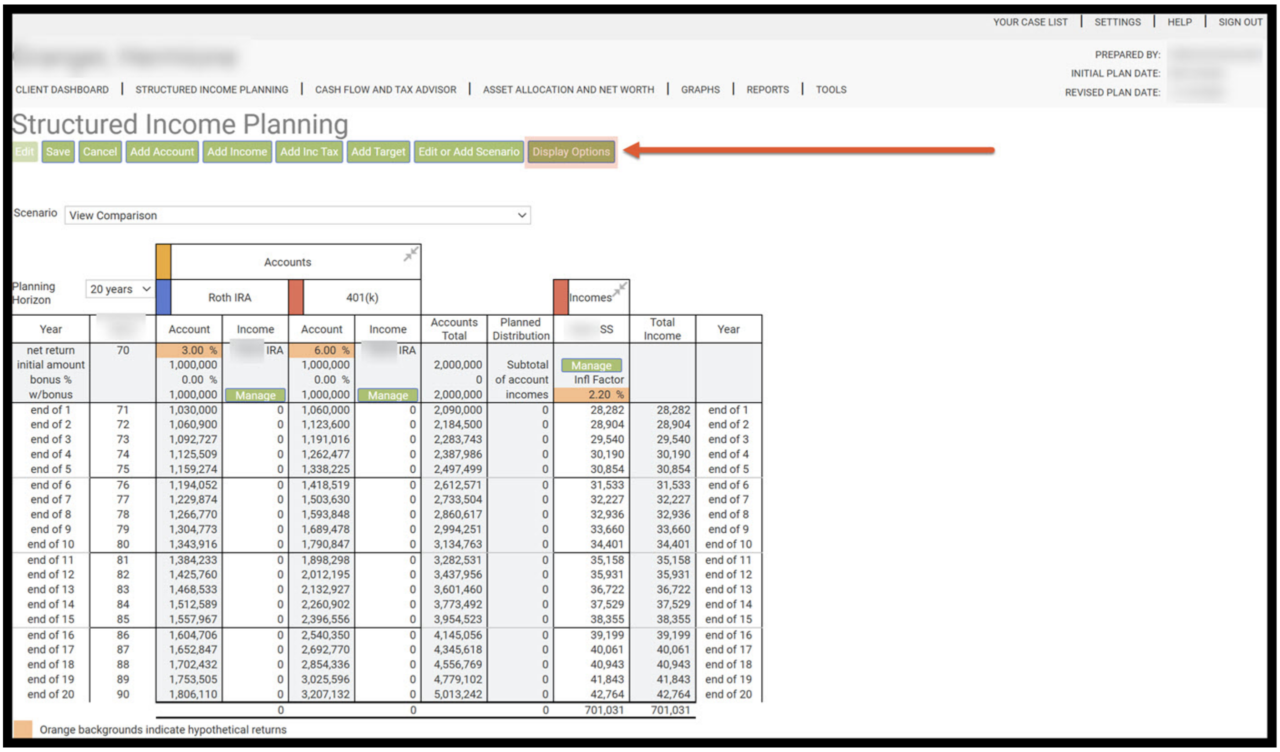
Step 11: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



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

Step 12: Display Options: Click on the green Display Option button underneath the Structured Income Planning

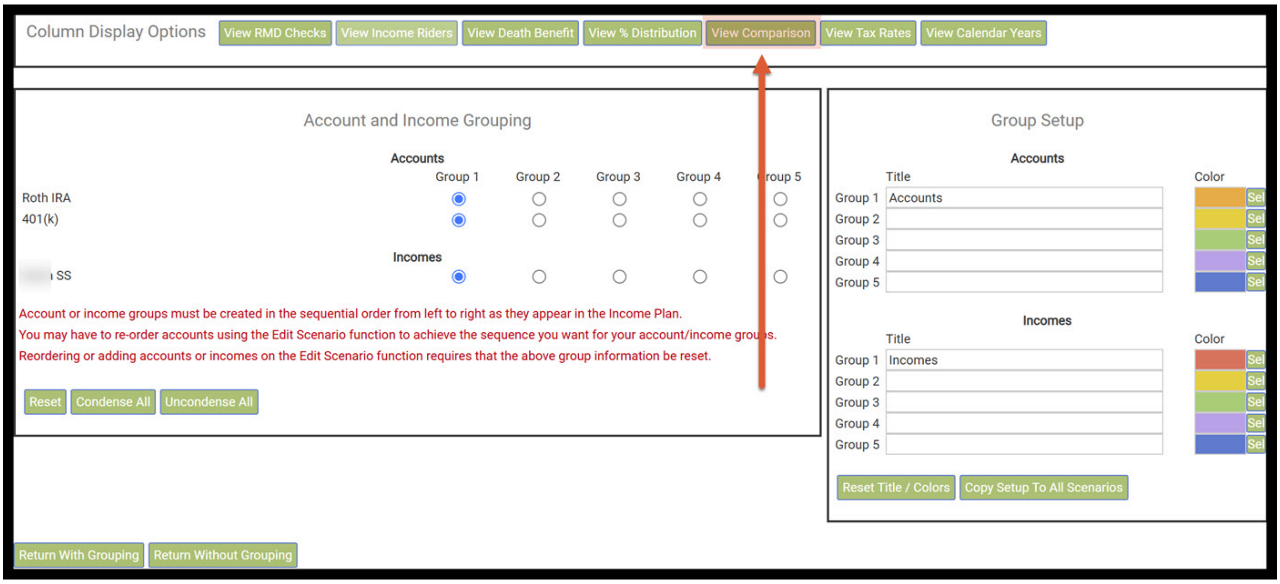
sub-heading.



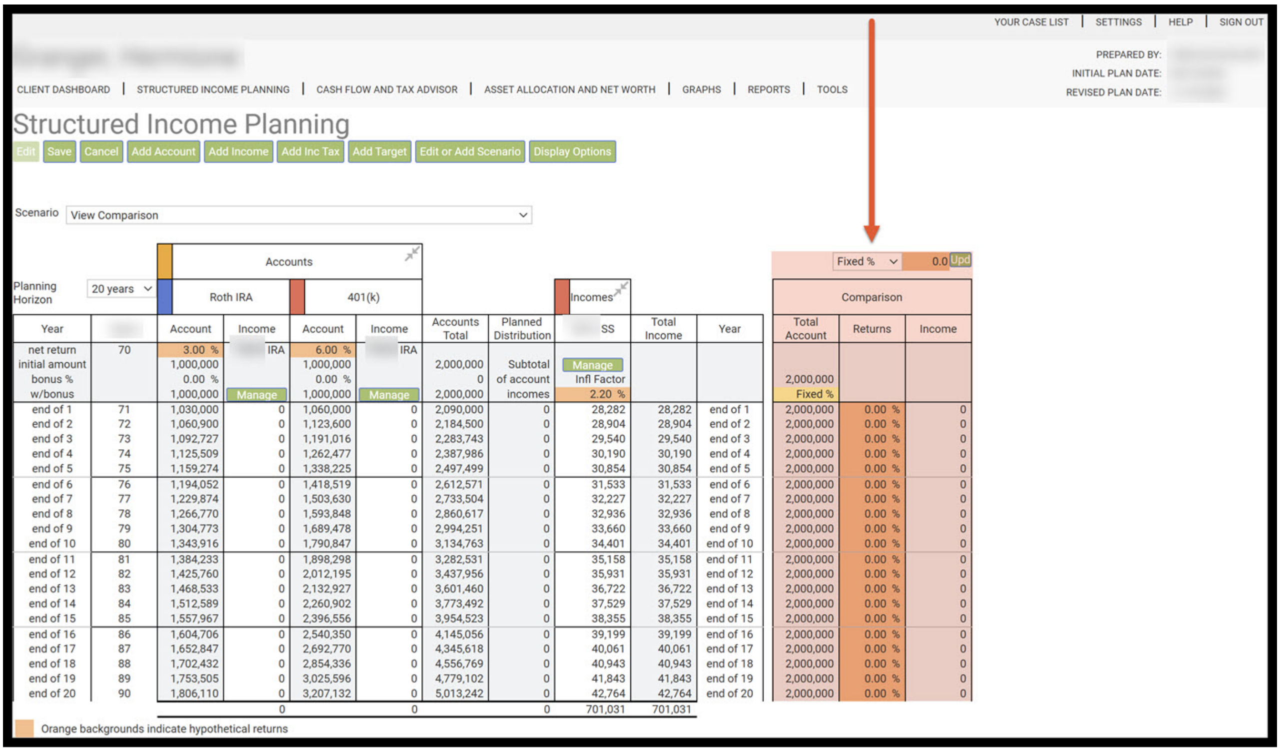
		Accounts								
		Roth IRA		401(k)				Incomes		
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	IRA					
initial amount		1,000,000		1,000,000		2,000,000	Subtotal	Manage		
bonus %		0.00 %		0.00 %		0	of account	Infl Factor		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

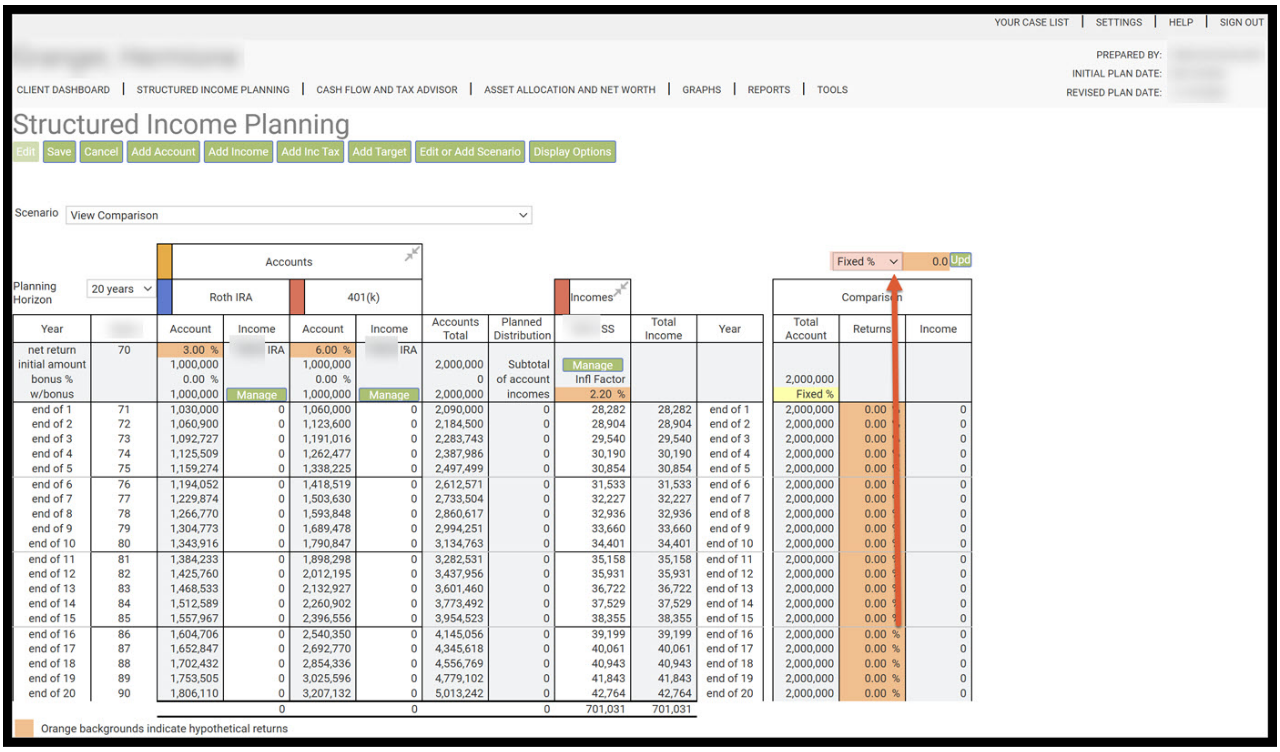
Step 13: View Comparison: Click on the green View Comparison button located in Column Display Options Table.



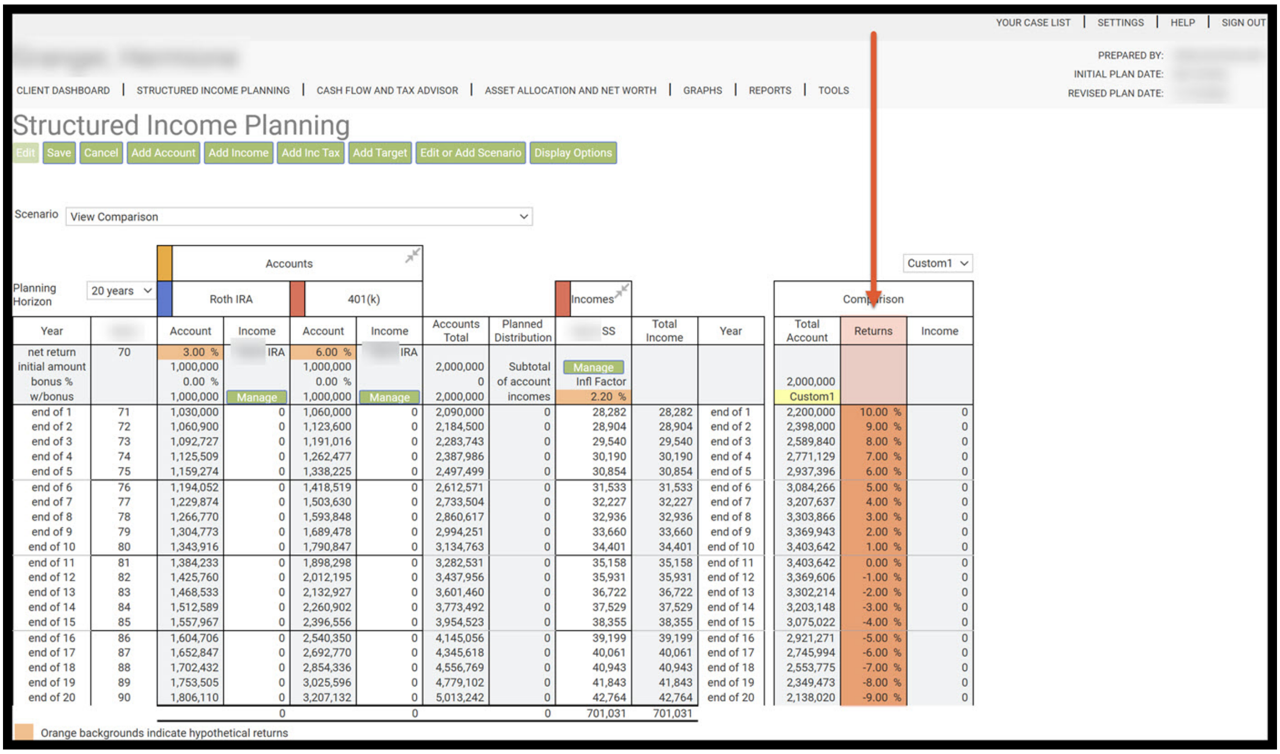
Step 14: Structured Income Planning Page: A new comparison table will appear on the Structured Income Planning Page.



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

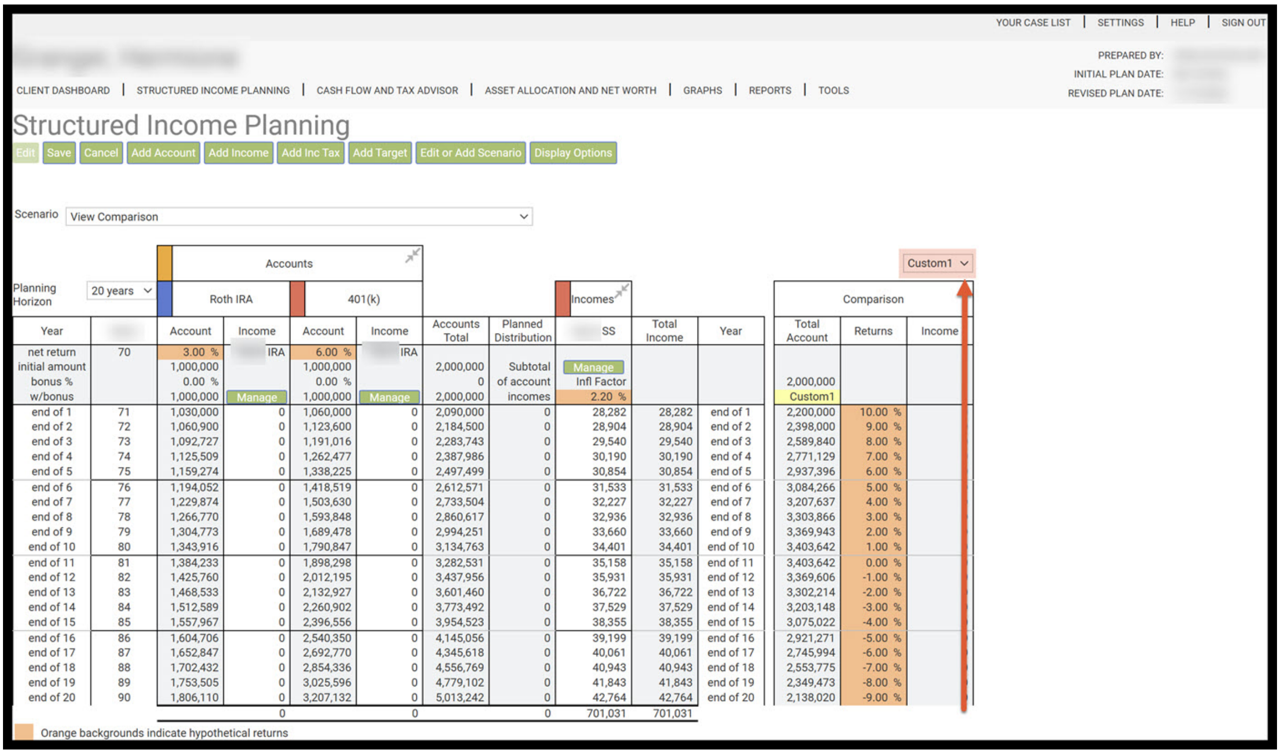


Step 16: Structured Income Planning Page: The custom rates should be reflected in the Returns column.



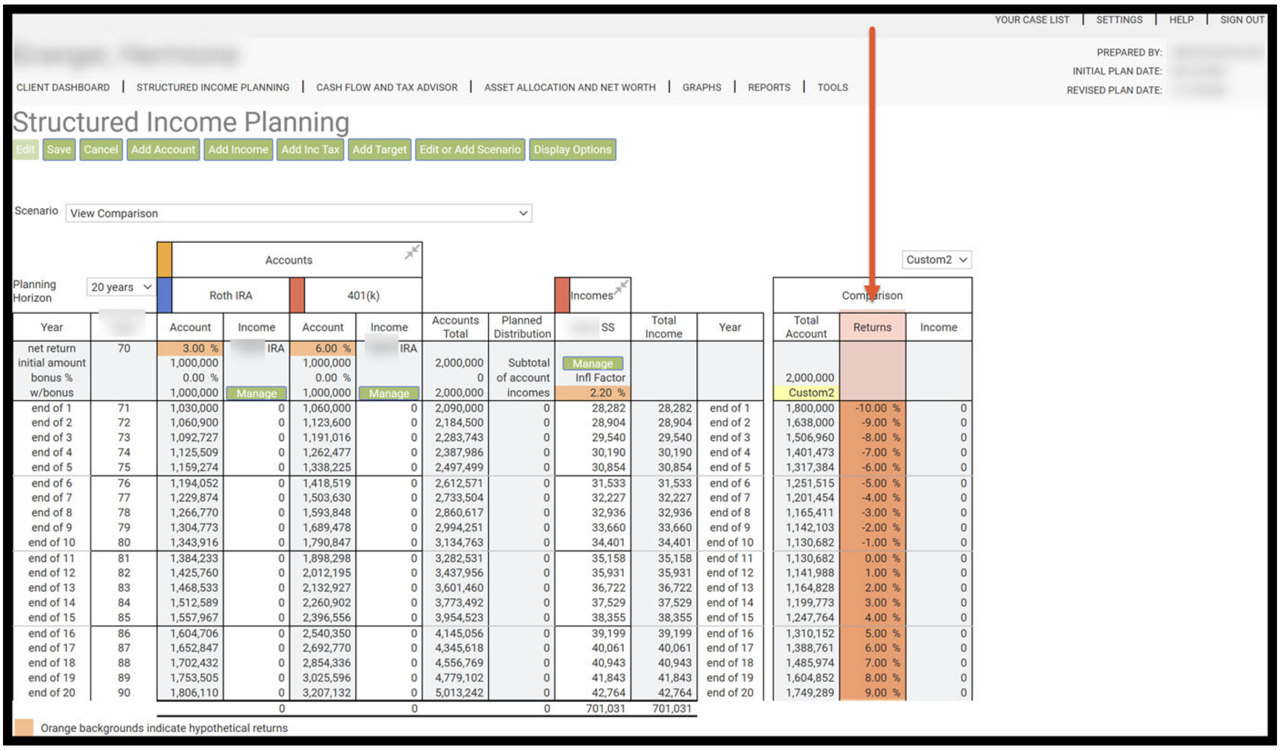
Year		Roth IRA Account	Roth IRA Income	401(k) Account	401(k) Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income
net return	70	3.00 %	IRA	6.00 %	IRA								
initial amount		1,000,000		1,000,000		2,000,000	Subtotal	Manage					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor			2,000,000		
w/bonus		1,000,000	Manage	1,000,000	Manage	2,000,000	incomes	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
			0		0		0	701,031	701,031				

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



Year		Roth IRA Account	Roth IRA Income	401(k) Account	401(k) Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income
net return	70	3.00 %	IRA	6.00 %	IRA								
initial amount		1,000,000		1,000,000		2,000,000	Subtotal	Manage					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor			2,000,000		
w/bonus		1,000,000	Manage	1,000,000	Manage	2,000,000	incomes	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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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 %	
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		0		0	701,031	701,031				

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

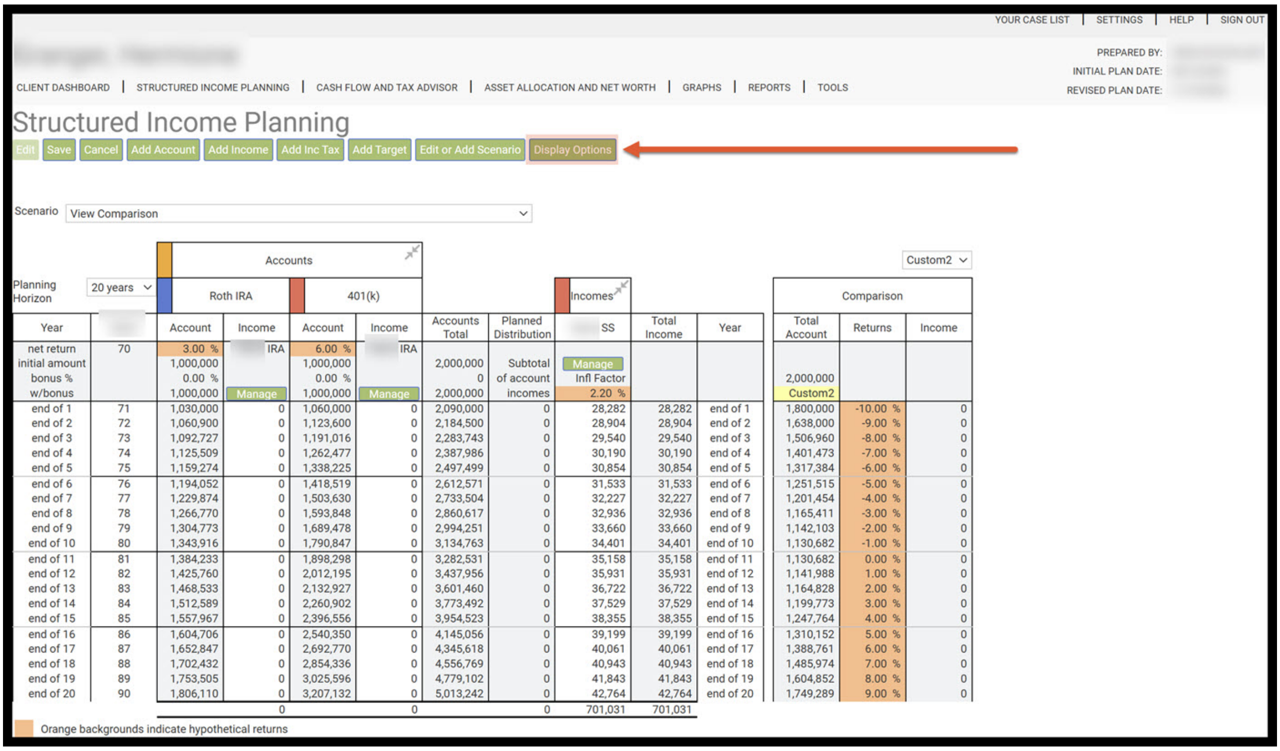
Scenario View Comparison

Custom2

		Accounts						Incomes			Comparison		
Planning Horizon	20 years	Roth IRA		401(k)									
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 %	IRA								
initial amount		1,000,000		1,000,000		2,000,000	Subtotal	Manage					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor			2,000,000		
w/bonus		1,000,000	Manage	1,000,000	Manage	2,000,000	incomes	2.20 %			Custom2		
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	42,764	42,764	end of 20	1,749,289	9.00 %	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

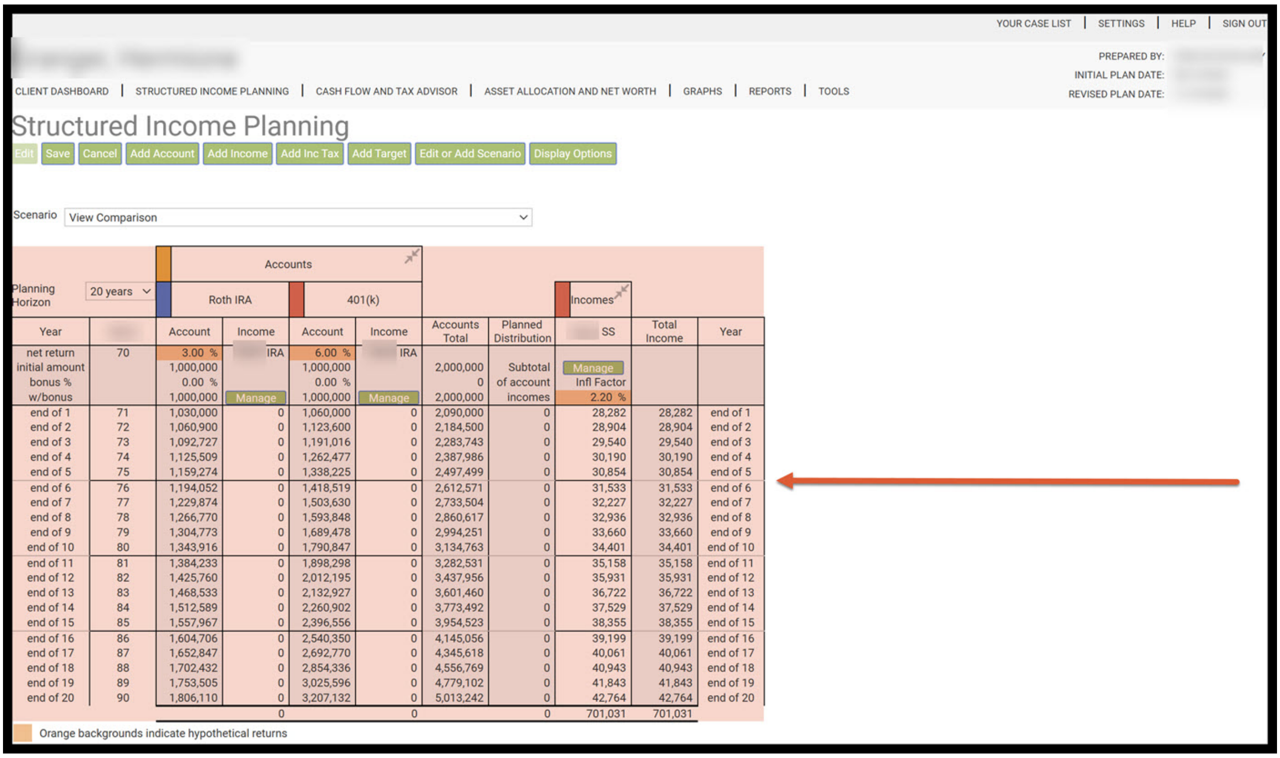
Custom2

		Accounts						Incomes			Comparison		
Planning Horizon	20 years	Roth IRA		401(k)									
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 %	IRA								
initial amount		1,000,000		1,000,000		2,000,000	Subtotal	Manage					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor			2,000,000		
w/bonus		1,000,000	Manage	1,000,000	Manage	2,000,000	incomes	2.20 %			Custom2		
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	42,764	42,764	end of 20	1,749,289	9.00 %	0
			0		0		0	701,031	701,031				

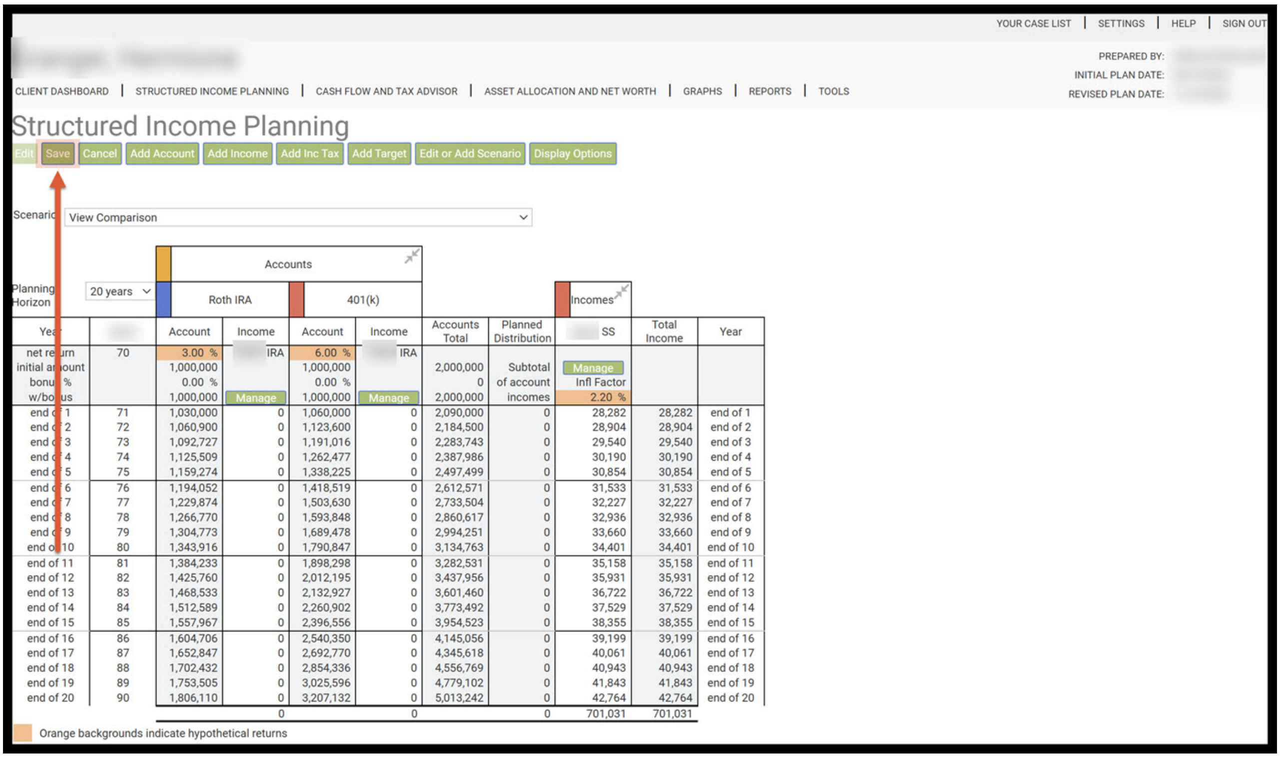
Orange backgrounds indicate hypothetical returns

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

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

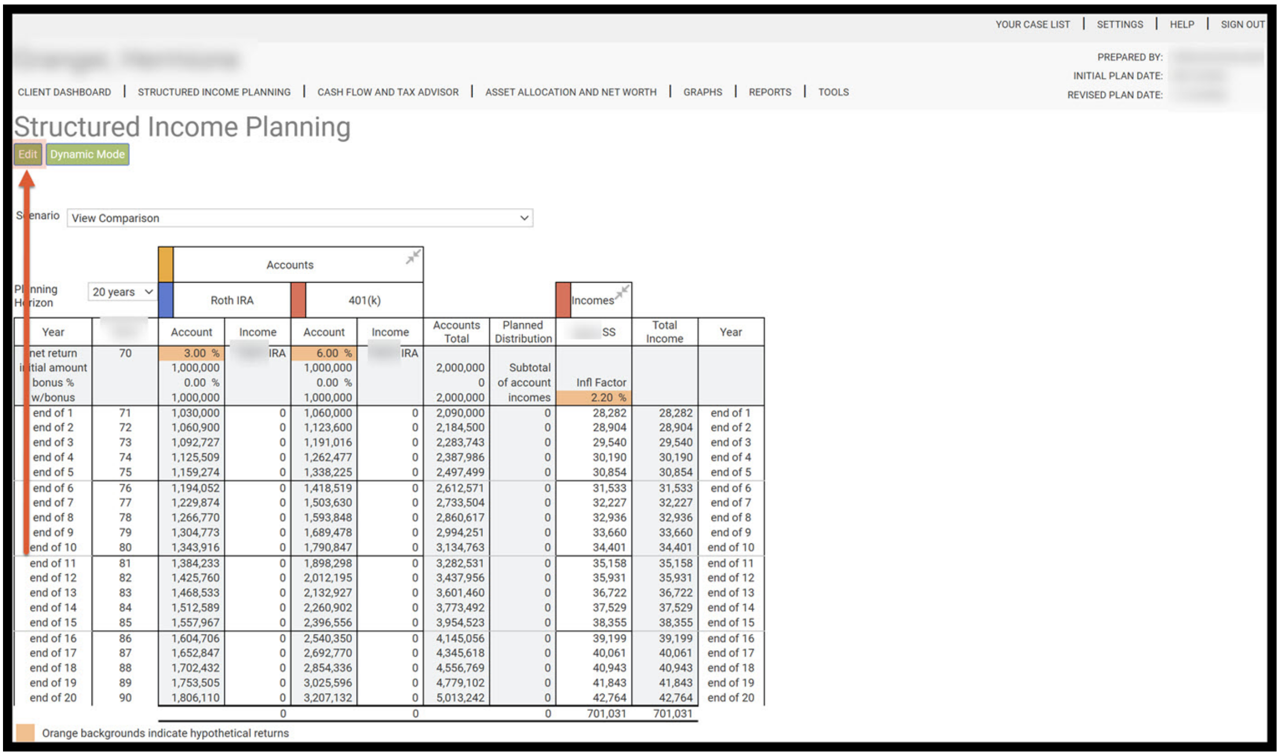


Step 22: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



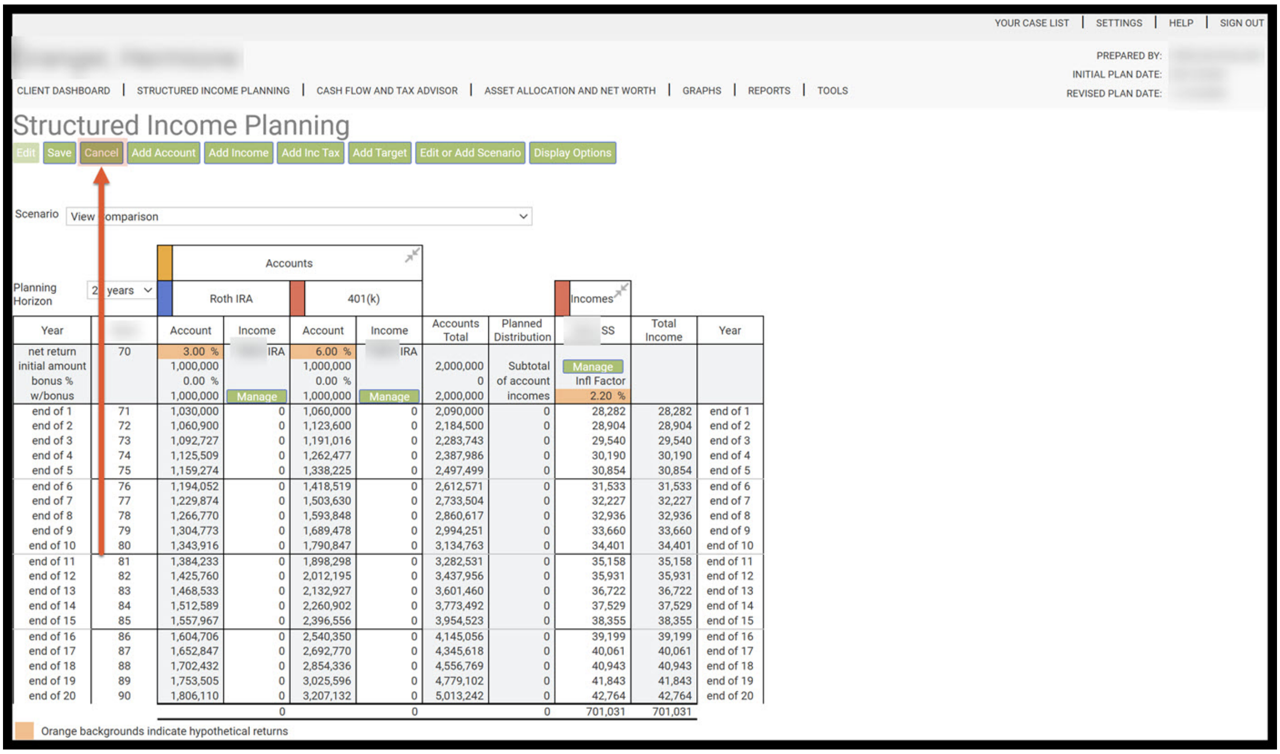
Year		Roth IRA Account	Roth IRA Income	401(k) Account	401(k) Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	IRA			Manage		
initial amount		1,000,000		1,000,000		2,000,000	Subtotal			
bonus %		0.00 %		0.00 %		0	of account	Infl Factor		
w/bonus		1,000,000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

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.



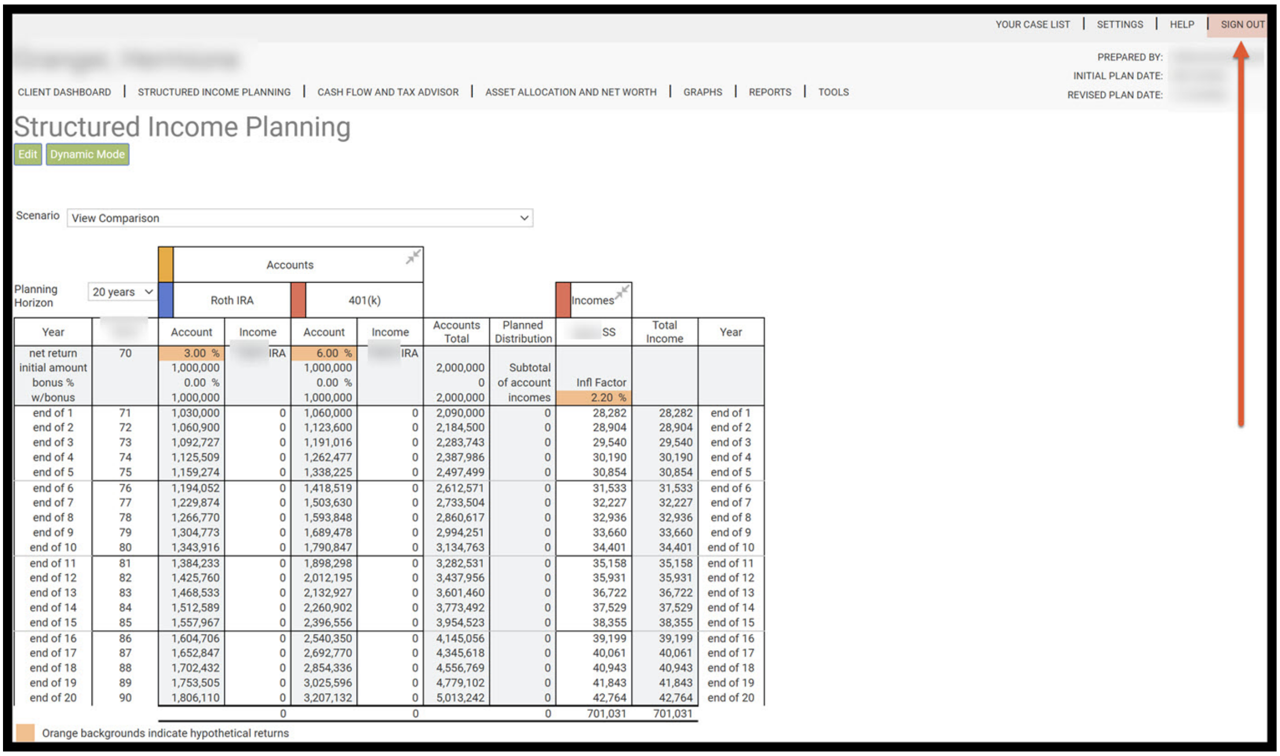
Year		Roth IRA Account	Roth IRA Income	401(k) Account	401(k) Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	IRA					
initial amount		1,000,000		1,000,000		2,000,000	Subtotal			
bonus %		0.00 %		0.00 %		0	of account	Infl Factor		
w/bonus		1,000,000		1,000,000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

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.



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

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.



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

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: support@planscout.com.