

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.

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Custom Return Rates

Save

Cancel

PREFERENCES

RECOMMENDATIONS

CUSTOM RETURN RATES

CUSTOM GROUPING OPTIONS

DISCLOSURE

ALLOCATION CODES

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

Custom Return Rates

Save

Cancel

PREFERENCES

RECOMMENDATIONS

CUSTOM RETURN RATES

CUSTOM GROUPING OPTIONS

DISCLOSURE

ALLOCATION CODES

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 %

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

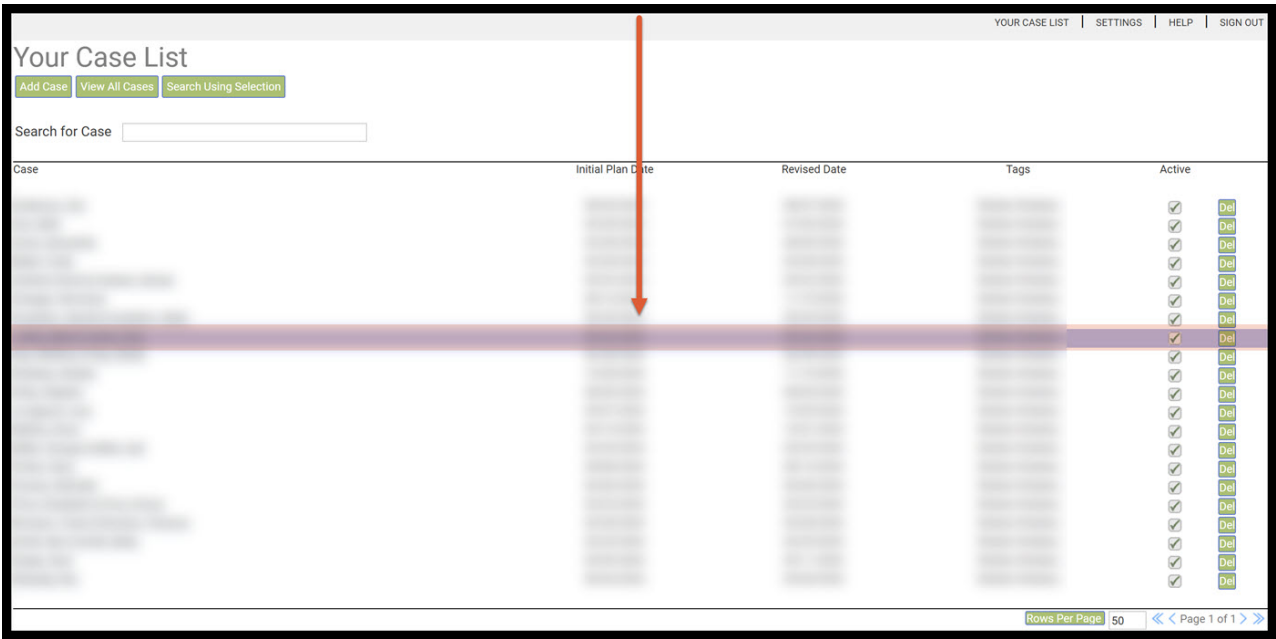
Search Using Selection

Search for Case

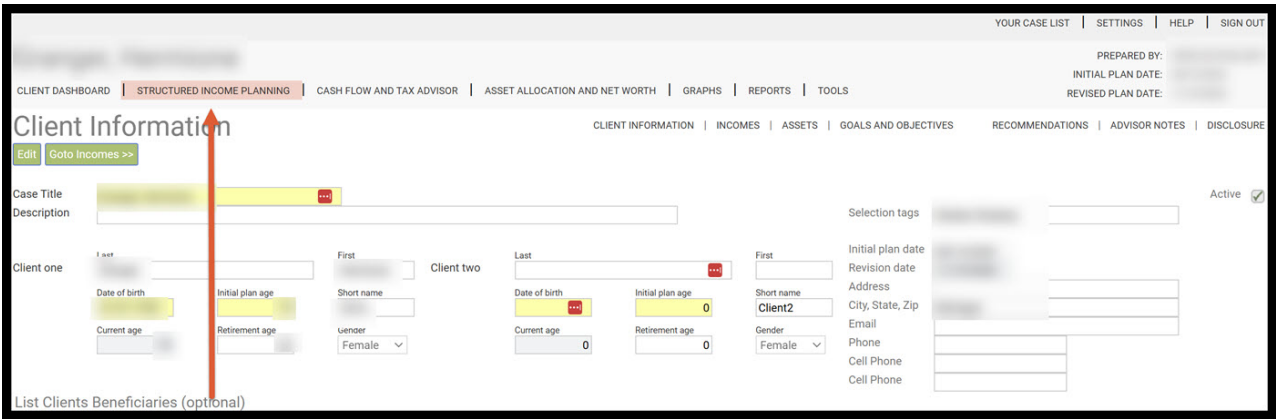
Case	Initial Plan Date	Revised Date	Tags	Active
<div> <div>Rows Per Page</div> <div>50</div> <div><< No records >></div> </div>				

Please use View All Cases or Search Using Selection to view one or more cases

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

CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

GRAPHS

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TOOLS

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Dynamic Mode

Scenario

View Comparison

Planning Horizon

20 years

Accounts

Roth IRA

401(k)

Incomes

SS

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Inf Factor		
initial amount		1,000,000		1,000,000	0		2.20 %		
bonus %		0.00 %		0.00 %	0				
w/bonus		1,000,000		1,000,000	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

CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

GRAPHS

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TOOLS

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Dynamic Mode

Scenario

View Comparison

Planning Horizon

20 years

Accounts

Roth IRA

401(k)

Incomes

SS

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Inf Factor		
initial amount		1,000,000		1,000,000	0		2.20 %		
bonus %		0.00 %		0.00 %	0				
w/bonus		1,000,000		1,000,000	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]

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[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	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			SS			
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Manage Inflation Factor	2.20 %		
initial amount		1,000,000		1,000,000	0					
bonus %		0.00 %		0.00 %	0					
w/bonus		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	
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 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: []

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	Color
Group 1: Accounts	[] Set
Group 2: []	[] Set
Group 3: []	[] Set
Group 4: []	[] Set
Group 5: []	[] Set

Incomes:

Title	Color
Group 1: Incomes	[] 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]

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

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

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

Incomes

Comparison Custom1

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 of account incomes	Manage			2,000,000		
bonus %		0.00 %		0.00 %			Inf Factor			Custom1		
w/bonus		1,000,000	Manage	1,000,000	2,000,000		2.20 %					
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	42,764	42,764	end of 20	2,138,020	-9.00 %	0
		0		0	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:

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

Incomes

Comparison Custom1

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 of account incomes	Manage			2,000,000		
bonus %		0.00 %		0.00 %			Inf Factor			Custom1		
w/bonus		1,000,000	Manage	1,000,000	2,000,000		2.20 %					
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	42,764	42,764	end of 20	2,138,020	-9.00 %	0
		0		0	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 Horizon20 years

Accounts

Roth IRA401(k)

Incomes

Custom2

Comparison

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	2,000,000	Subtotal of account incomes	Manage Infl Factor		2,000,000			
initial amount		1,000,000		1,000,000		0		2.20 %		Custom2			
bonus % w/bonus		1,000,000	Manage	1,000,000	Manage	2,000,000							
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		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:
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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 Horizon20 years

Accounts

401(k)

Incomes

Custom2

Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income
net return	70	3.00 %		6.00 %		2,000,000					2,000,000		
initial amount		1,000,000		1,000,000		0	Subtotal of account incomes	Manage			Custom2		
bonus % w/bonus		1,000,000	Manage	1,000,000	Manage	2,000,000		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	1,800,000		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.

Column Display Options
View RMD Checks
View Income Riders
View Death Benefit
View % Distribution
Hide Comparison
View Tax Rates
View Calendar Years

Account and Income Grouping

Accounts

Group 1
Group 2
Group 3
Group 4
Group 5

Roth IRA
401(k)

Incomes

SS

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

Group 1
Group 2
Group 3
Group 4
Group 5

Title
Accounts

Color

Incomes

Group 1
Group 2
Group 3
Group 4
Group 5

Title
Incomes

Color

Reset Title / Colors
Copy Setup To All Scenarios

Return With Grouping
Return Without Grouping

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

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

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	2,000,000	Subtotal of account incomes	Manage Inflation Factor 2.20 %		
initial amount		1,000,000		1,000,000	0				
bonus %		0.00 %		0.00 %					
w/ bonus		1,000,000	Manage	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
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	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

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

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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						Incomes			
		Roth IRA		401(k)							
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	
net return	70	3.00 %		6.00 %		2,000,000	Subtotal of account incomes	Manage Inft Factor 2.20 %			
initial amount		1,000,000		1,000,000		0					
bonus % w/bonus		1,000,000		1,000,000		2,000,000					
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 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

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

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

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

Scenario: View Comparison

Planning Horizon: 20 years

		Accounts						Incomes			
		Roth IRA		401(k)							
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	
net return	70	3.00 %		6.00 %		2,000,000	Subtotal of account incomes	Manage Inft Factor 2.20 %			
initial amount		1,000,000		1,000,000		0					
bonus % w/bonus		1,000,000		1,000,000		2,000,000					
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 24: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

The screenshot shows the 'Structured Income Planning' subheading with a row of buttons: Edit, Save, Cancel, Add Account, Add Income, Add Inc Tax, Add Target, Edit or Add Scenario, and Display Options. A red arrow points to the 'Cancel' button. Below the buttons is a 'Scenario' dropdown menu set to 'View Comparison'. The main content area displays a table with columns for Year, Account, Income, Accounts Total, Planned Distribution, SS, Total Income, and Year. The table shows data for a 20-year planning horizon, with rows for 'net return', 'initial amount', 'bonus %', 'w/bonus', and 'end of' years 1 through 20. The 'Accounts' section includes 'Roth IRA' and '401(k)' with their respective 'Income' and 'Accounts Total' values. The 'Incomes' section shows 'SS' and 'Total Income' values. The table is partially obscured by orange backgrounds, indicating 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.

The screenshot shows the 'Structured Income Planning' subheading with a row of buttons: Edit, Dynamic Mode, and a 'SIGN OUT' button in the top right corner. A red arrow points to the 'SIGN OUT' button. Below the buttons is a 'Scenario' dropdown menu set to 'View Comparison'. The main content area displays a table with columns for Year, Account, Income, Accounts Total, Planned Distribution, SS, Total Income, and Year. The table shows data for a 20-year planning horizon, with rows for 'net return', 'initial amount', 'bonus %', 'w/bonus', and 'end of' years 1 through 20. The 'Accounts' section includes 'Roth IRA' and '401(k)' with their respective 'Income' and 'Accounts Total' values. The 'Incomes' section shows 'SS' and 'Total Income' values. The table is partially obscured by orange backgrounds, indicating hypothetical returns.

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

