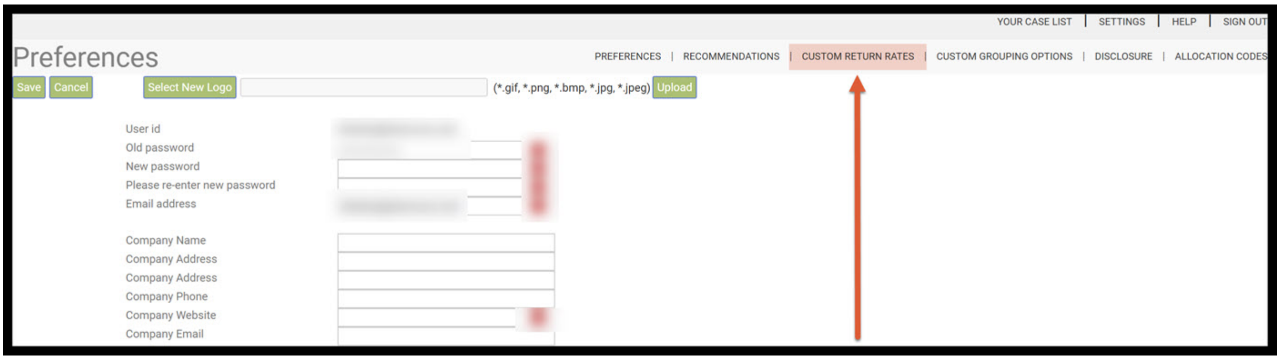
Creating Custom Rate Returns for the View Comparison Table

11/22/2024 11:38 am EST

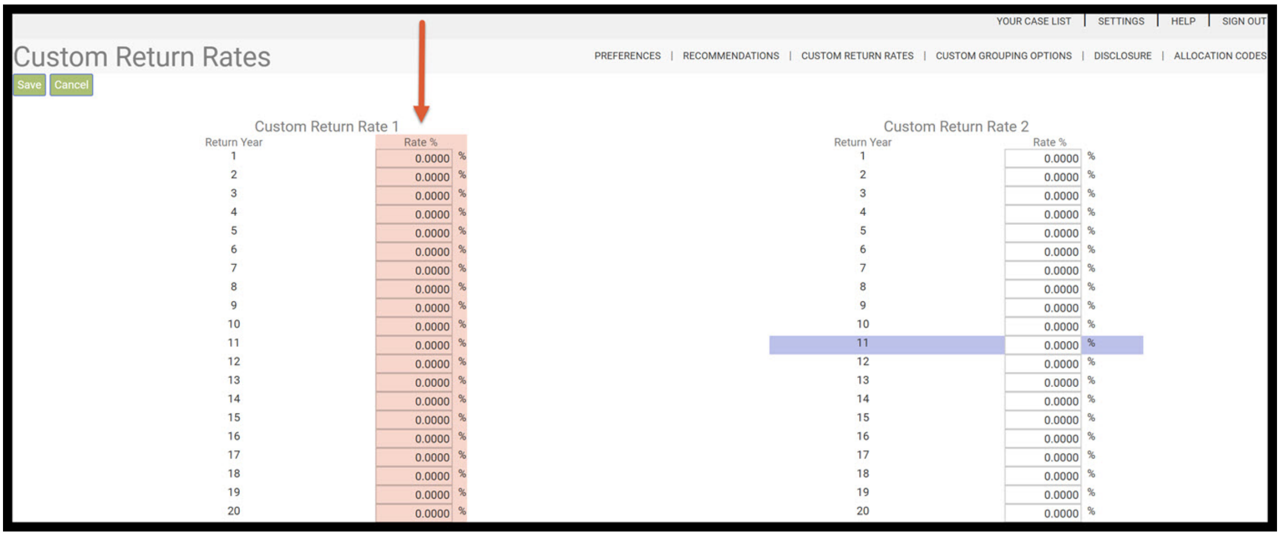
Within the Comparison Table you can create your own custom rate returns. Below is a step-by-step guideline for creating custom rate returns for the Comparison Table on the Structured Income Planning Page.

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

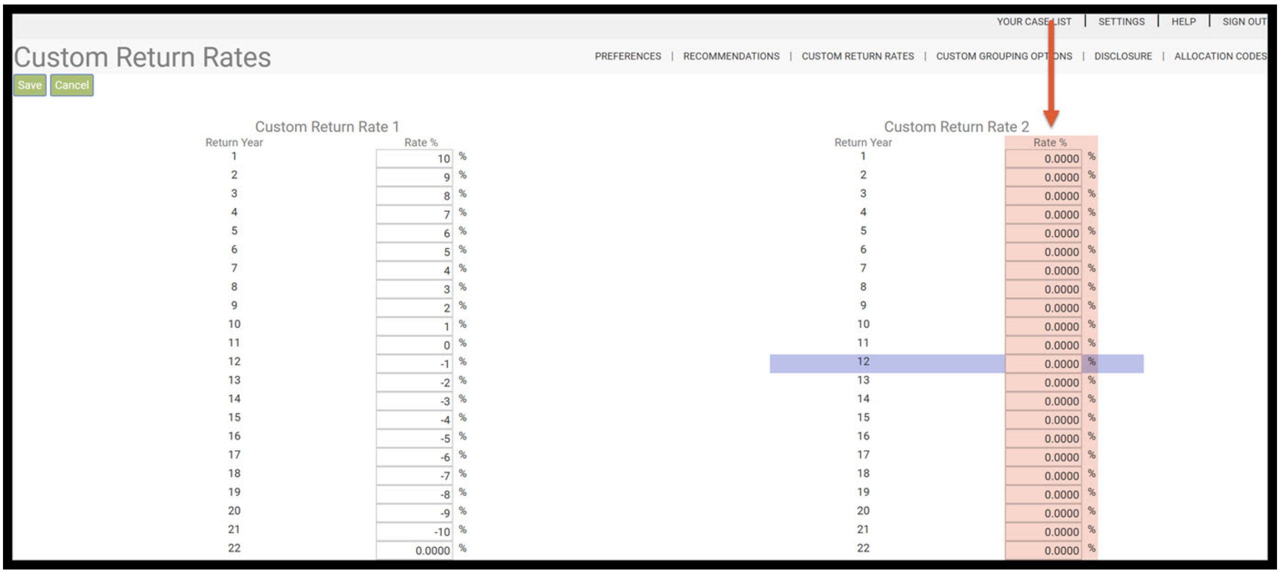
Step 2: Custom Rate Returns: Click on the Custom Rate Returns heading.



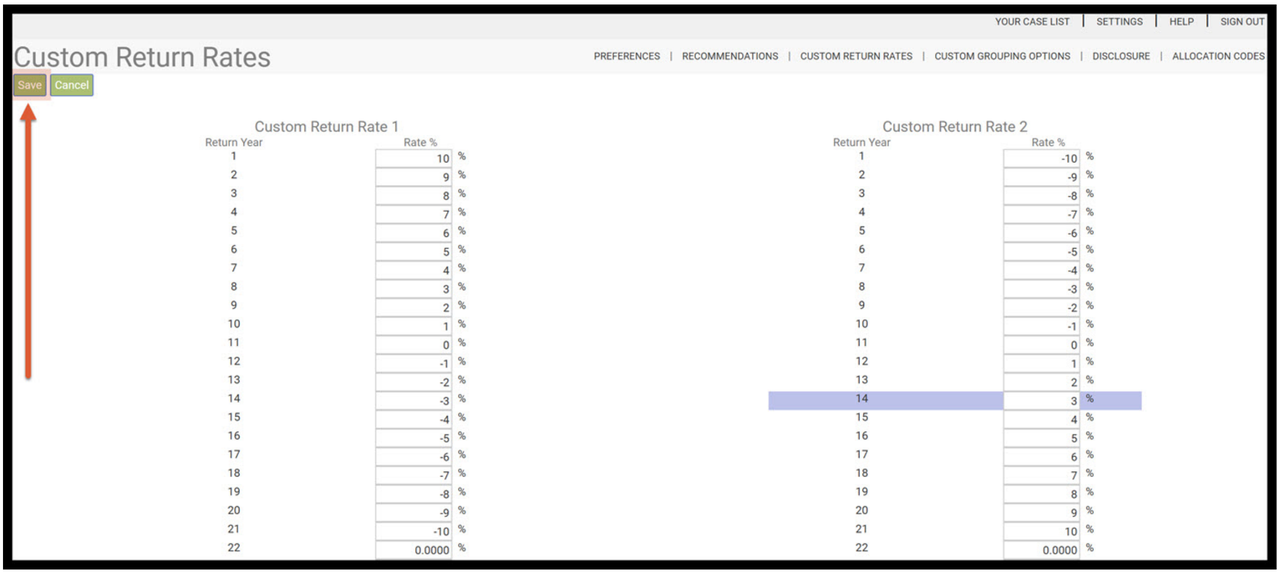
Step 3: Custom Rate Return 1: Filter in the numeric data you would like to use.



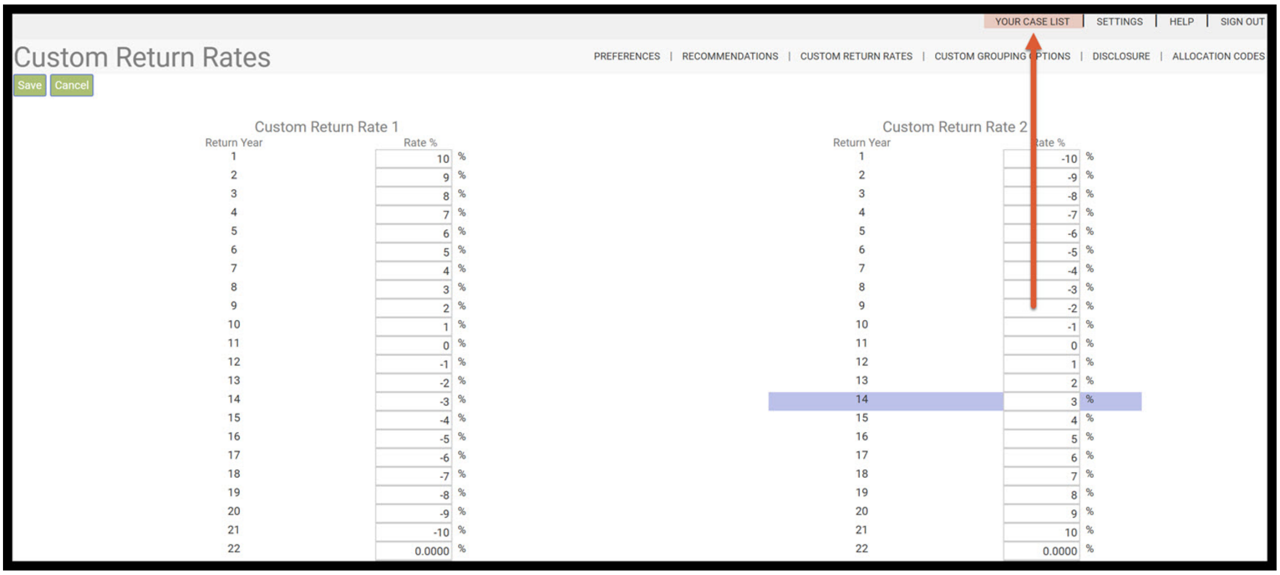
Step 4: Custom Rate Return 2: Filter in the numeric data you would like to use.



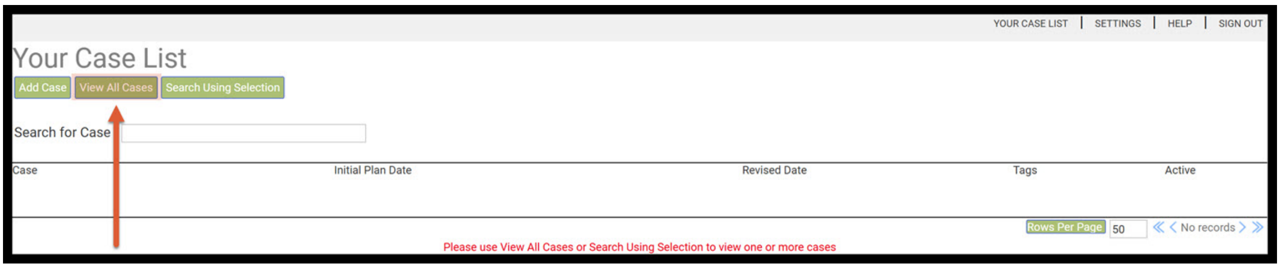
Step 5: Save: Click on the green Save button underneath the Custom Rate Returns heading.



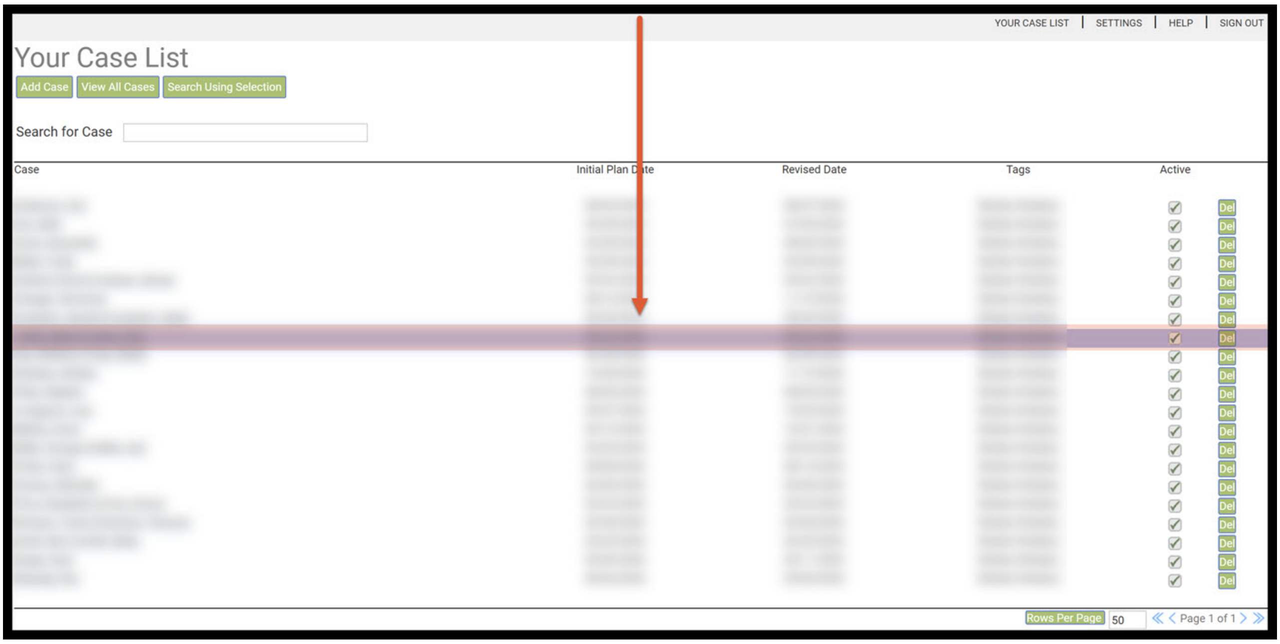
Step 6: Your Case List: Click on Your Case List heading that is located in the upper right-hand side of the screen.



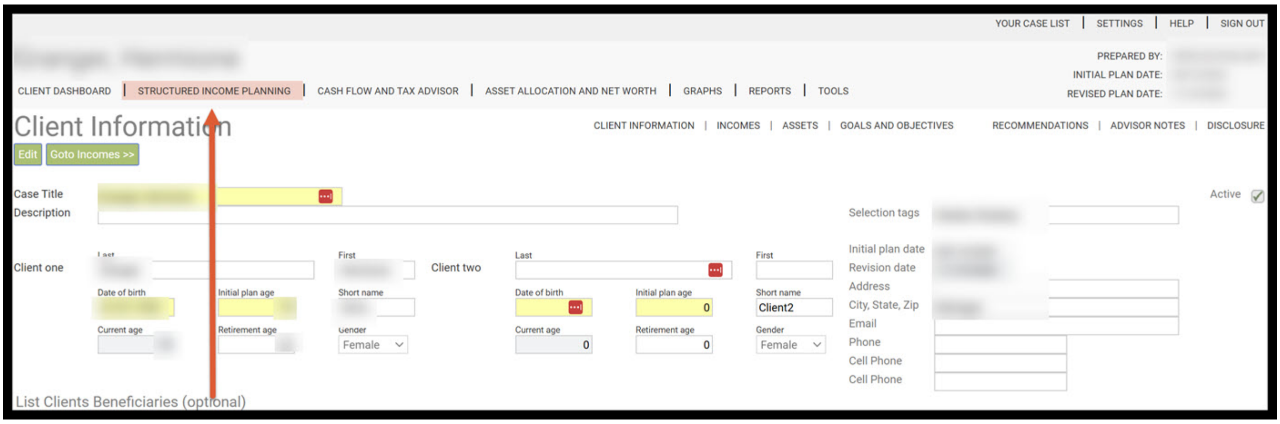
Step 7: View All Cases: Click on the green View All Cases button located underneath the Your Case List heading.



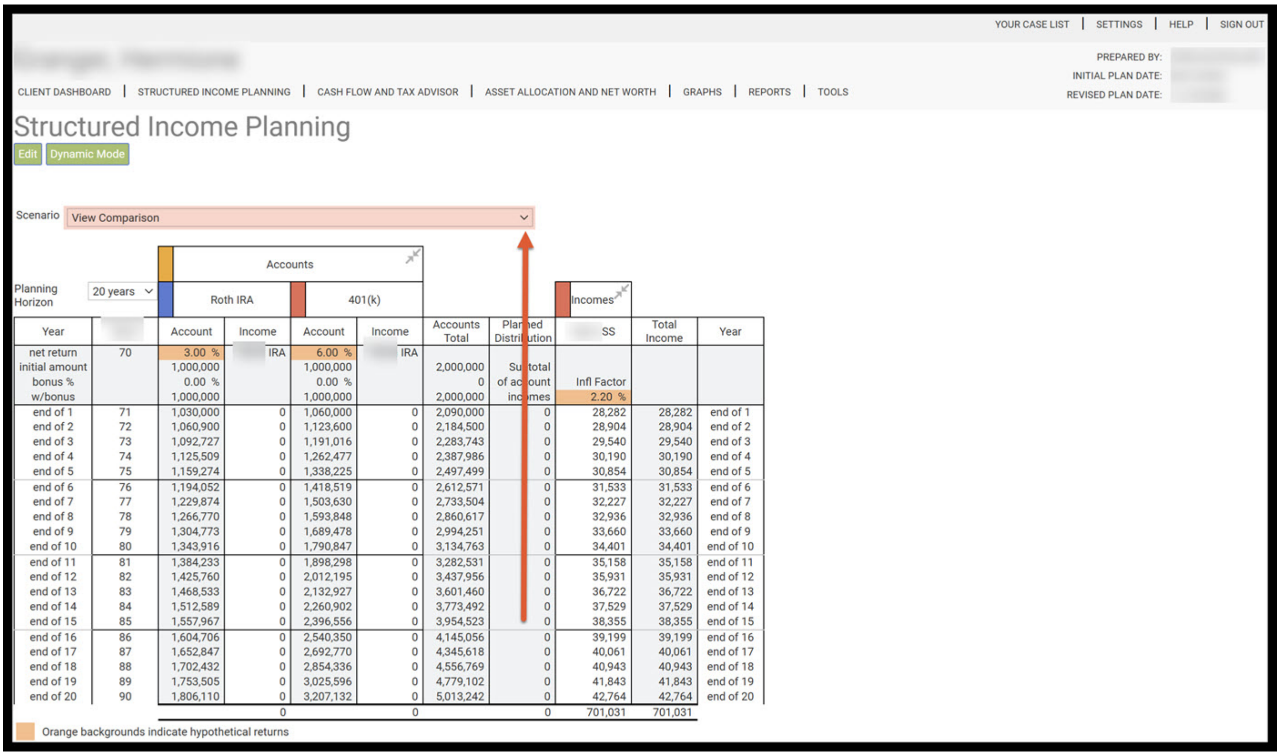
Step 8: Case Selection: Selection which case you would like to open up.



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.



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

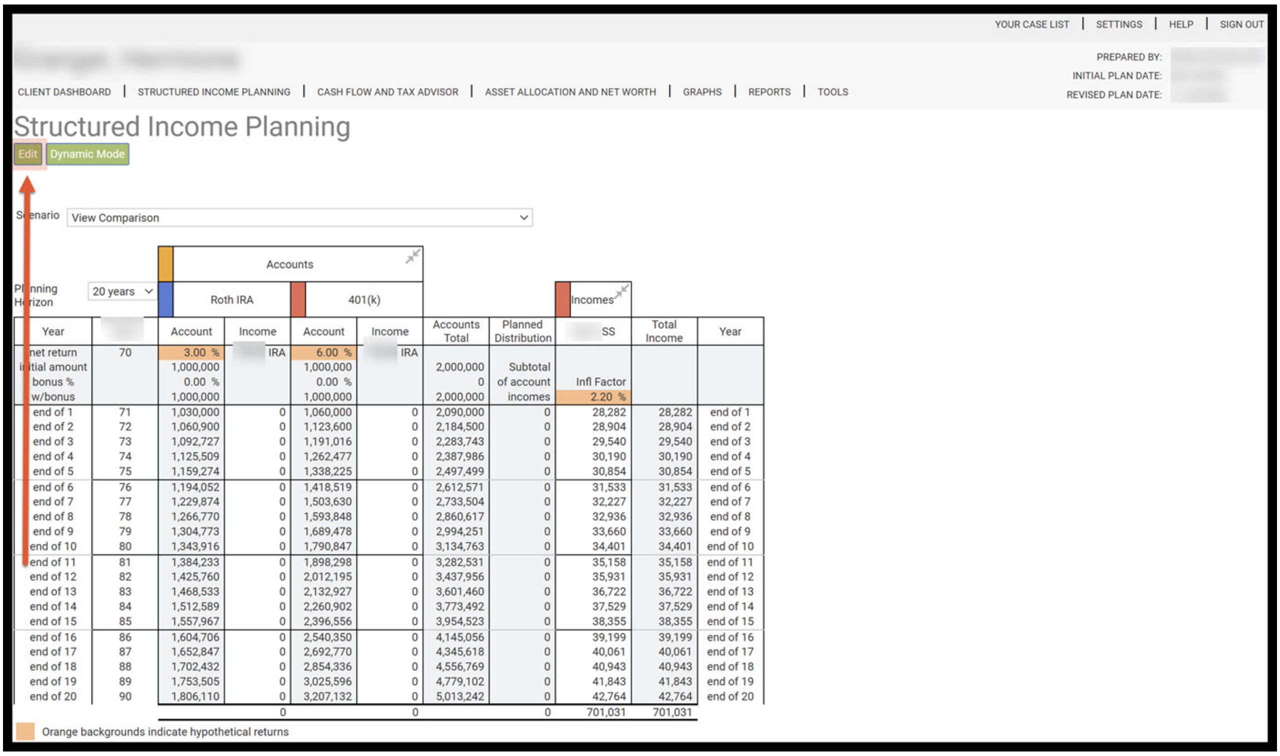
Scenario: View Comparison

Planning Horizon: 20 years

		Accounts						Incomes		
		Roth IRA		401(k)						
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	

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:
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

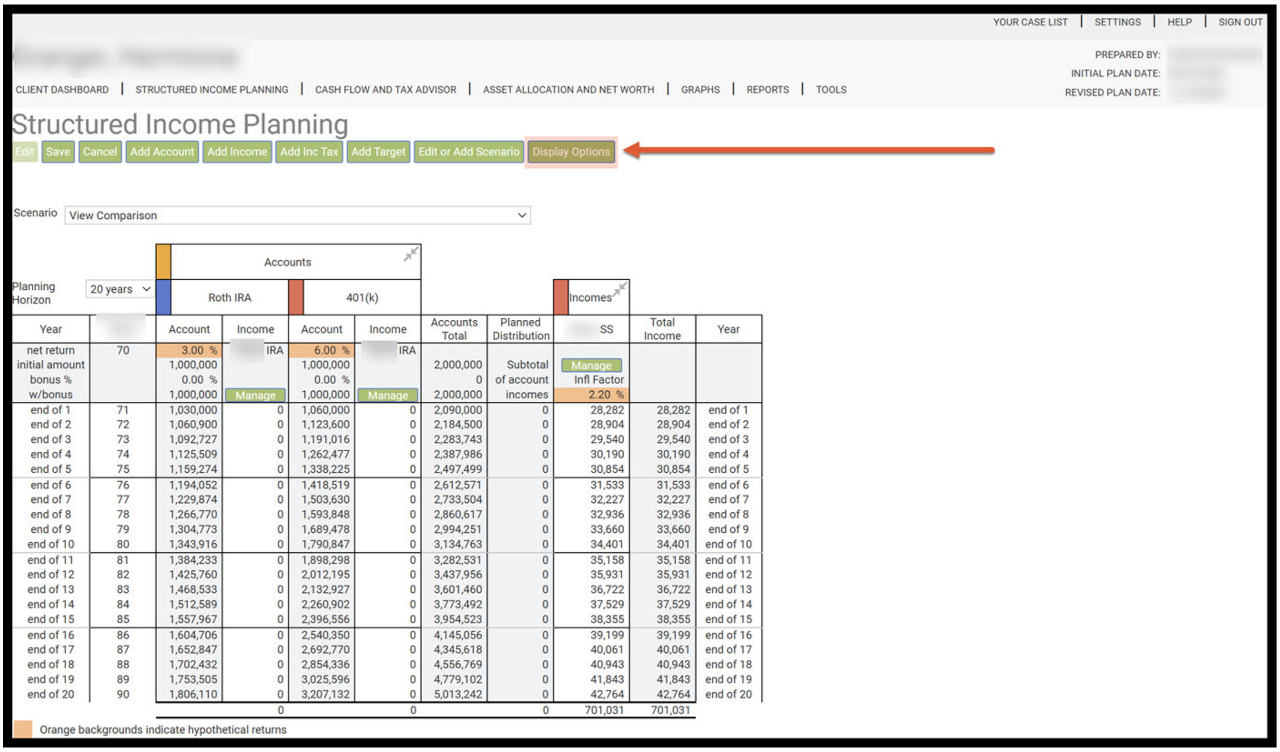
Scenario: View Comparison

Planning Horizon: 20 years

		Accounts						Incomes		
		Roth IRA		401(k)						
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	

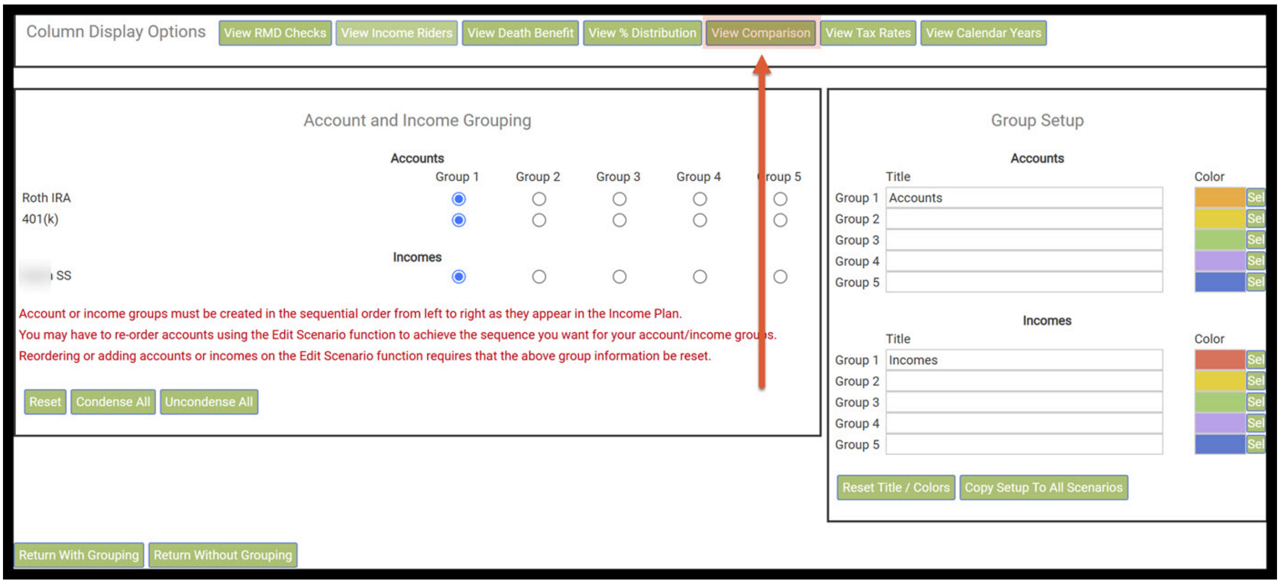
Orange backgrounds indicate hypothetical returns

Step 12: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.

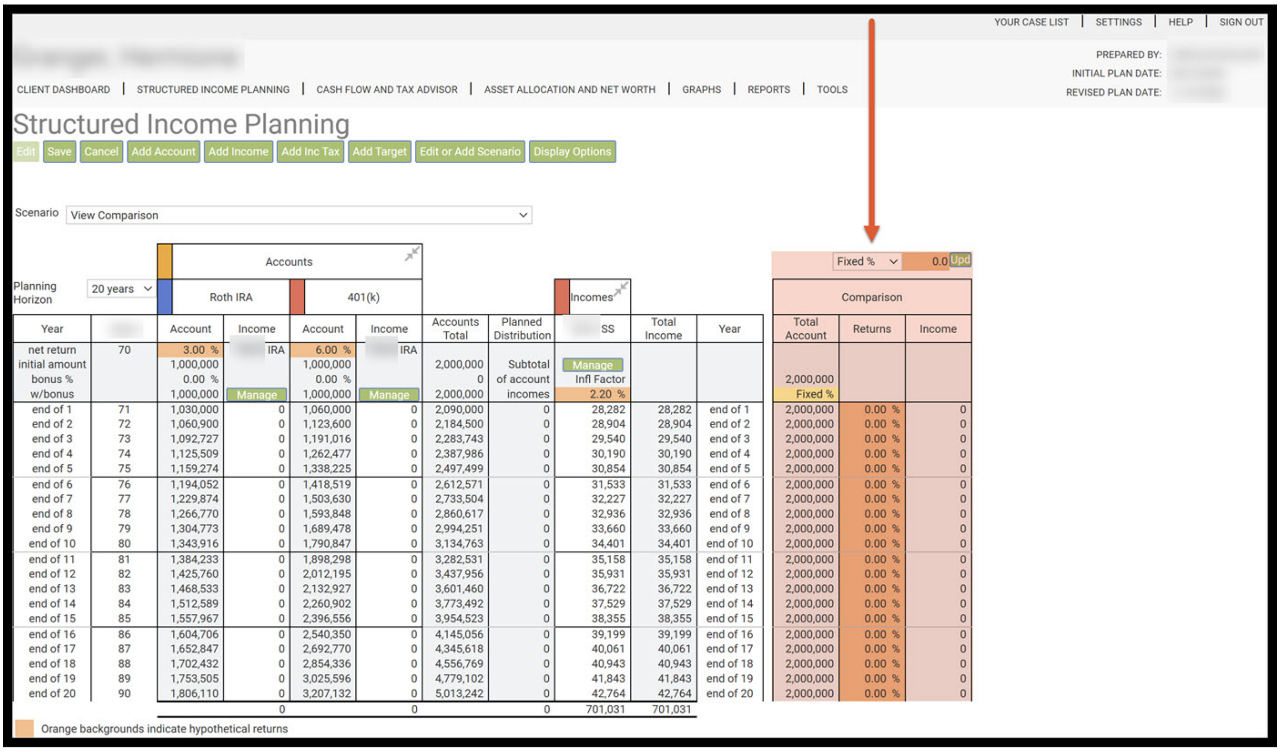


Year		Roth IRA Account	Roth IRA Income	401(k) Account	401(k) Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	70	3.00 %	IRA	6.00 %	IRA					
initial amount		1,000,000		1,000,000		2,000,000	Subtotal	Manage		
bonus %		0.00 %		0.00 %		0	of account	Infl Factor		
w/bonus		1,000,000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

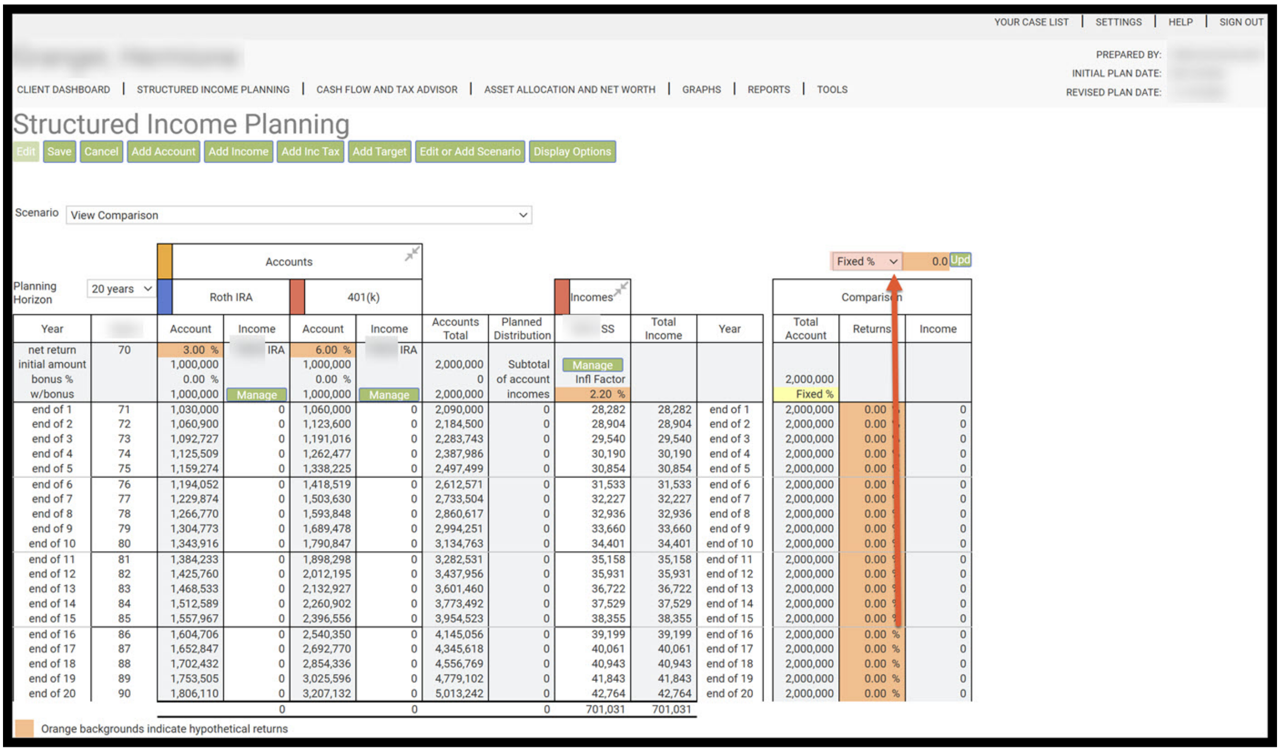
Step 13: View Comparison: Click on the green View Comparison button located in Column Display Options Table.



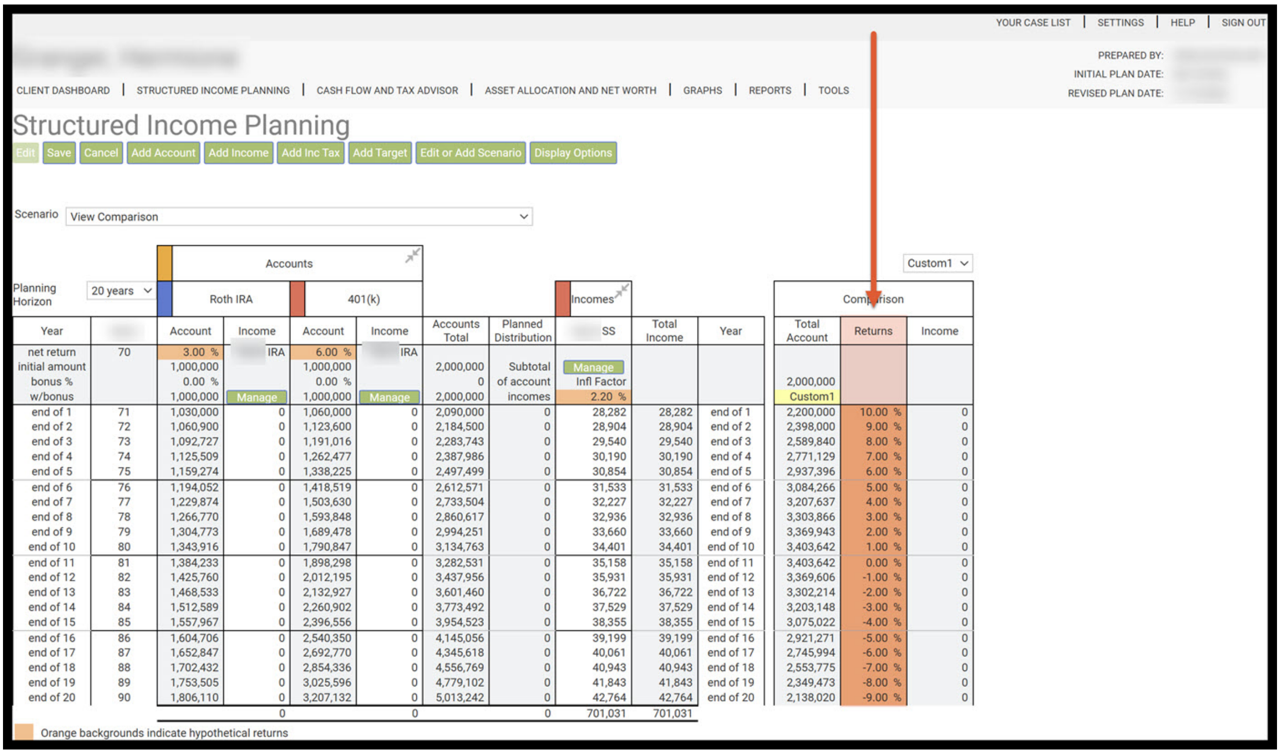
Step 14: Structured Income Planning Page: A new comparison table will appear on the Structured Income Planning Page.



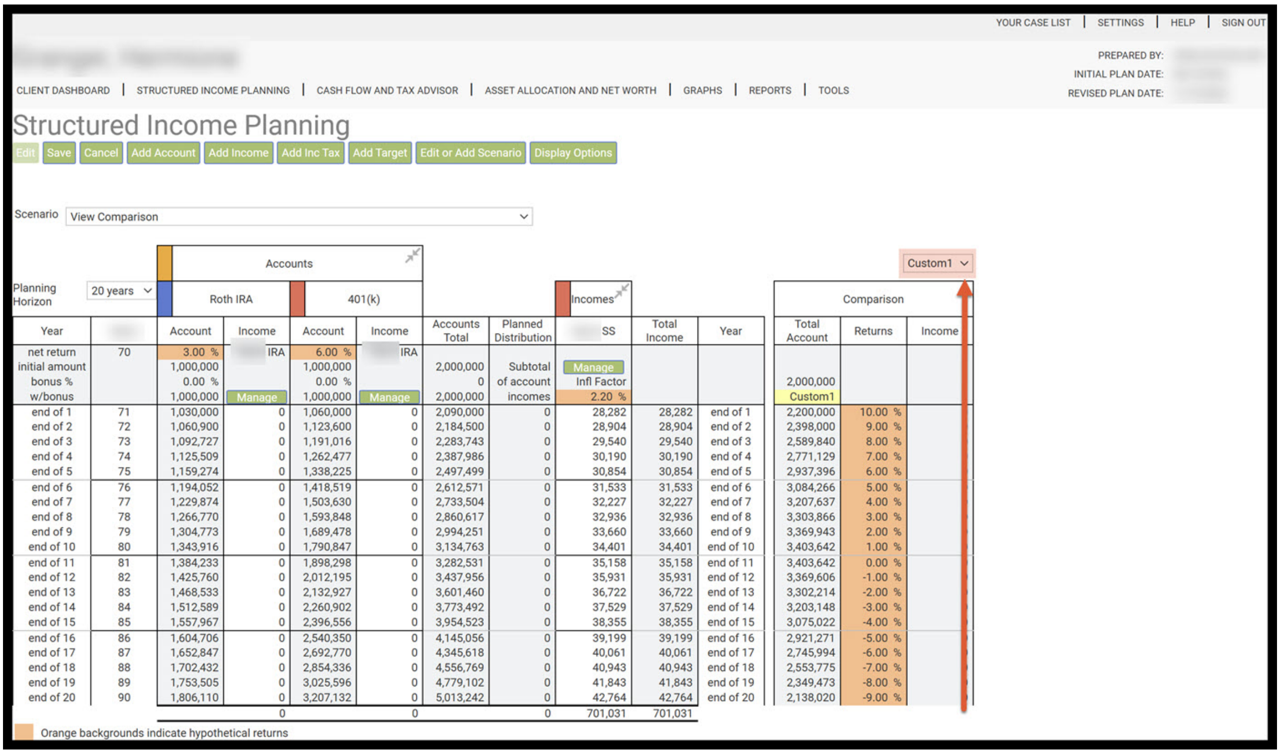
Step 15: Custom 1: Using the drop-down carrot arrow, select Custom 1.



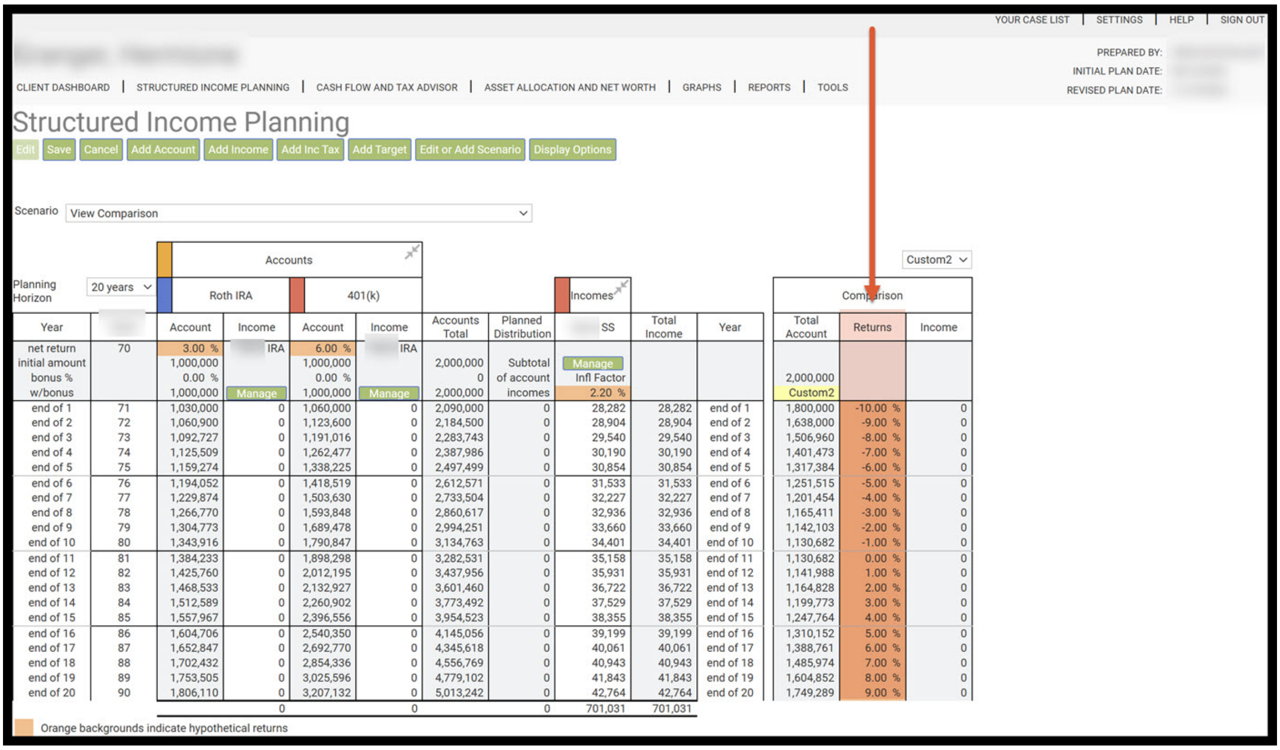
Step 16: Structured Income Planning Page: The custom rates should be reflected in the Returns column.



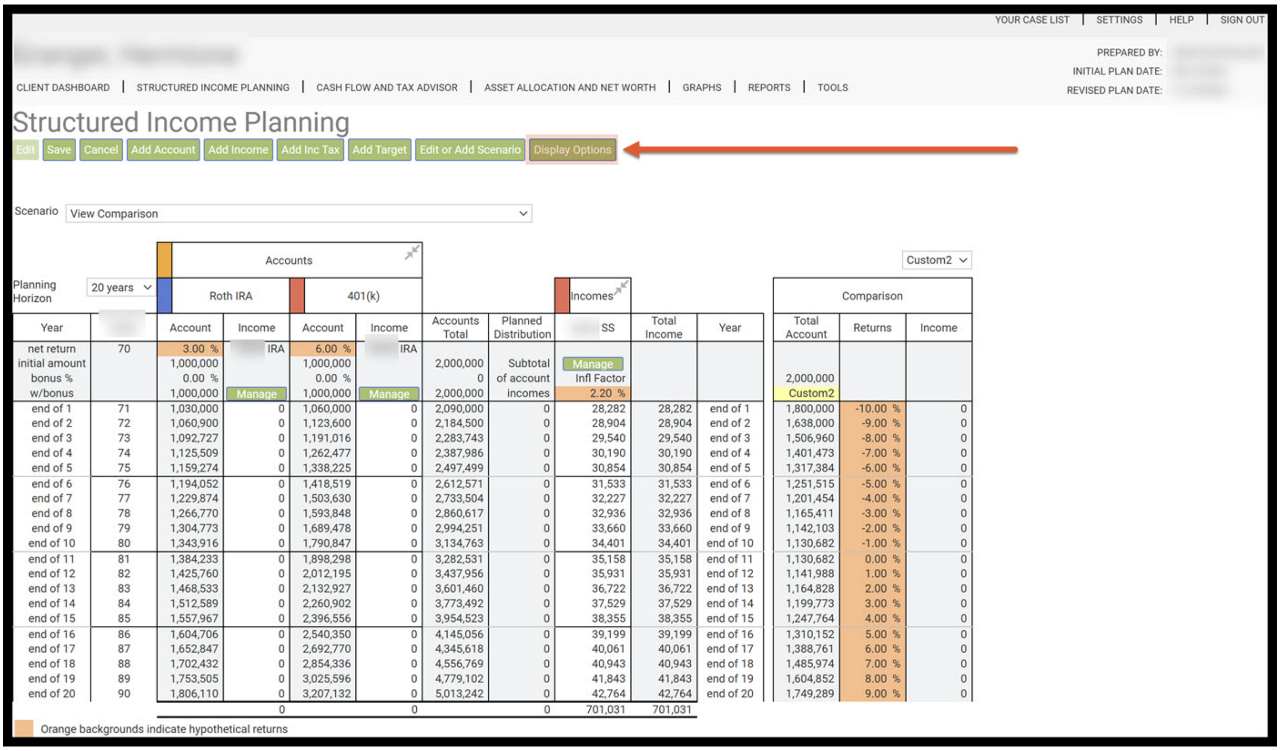
Step 17: Custom 2: Using the drop-down carrot arrow, select Custom 2.



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

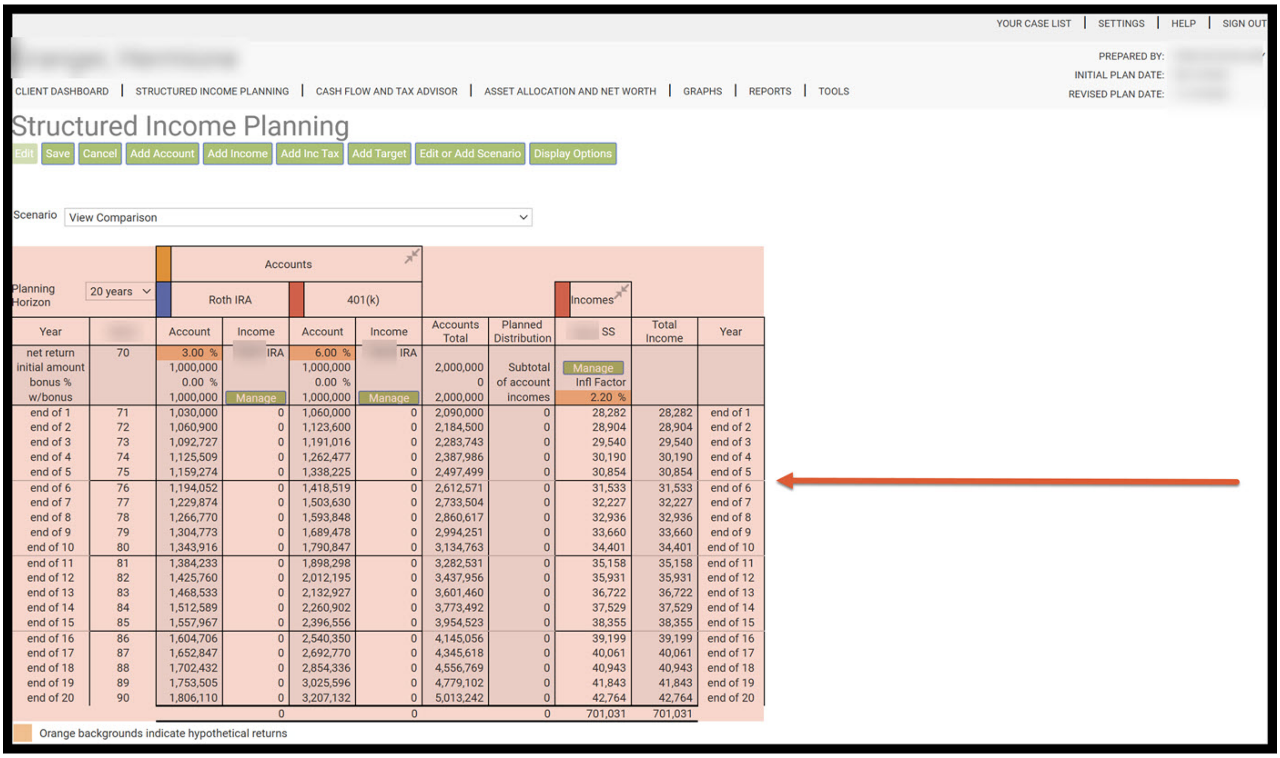


Step 19: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.

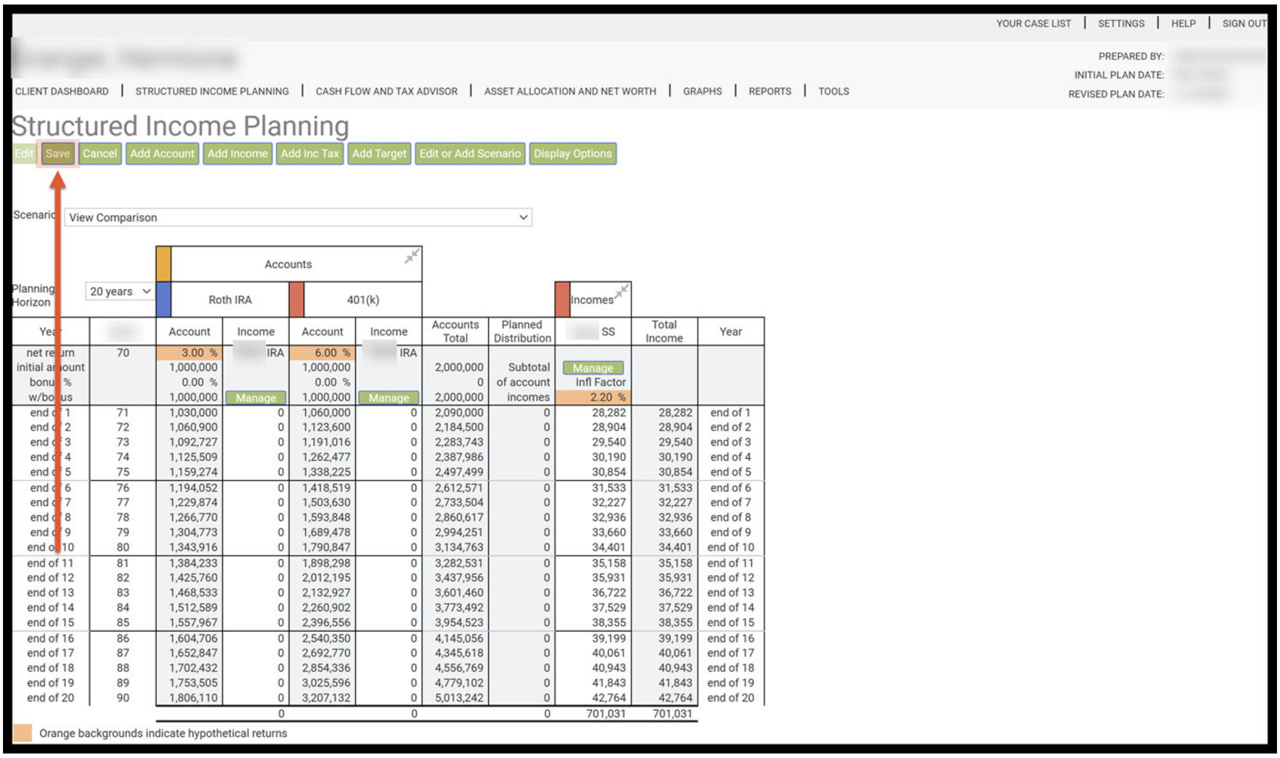


Step 20: Hide Comparison: Click on the green Hide Comparison button located in Column Display Options Table.

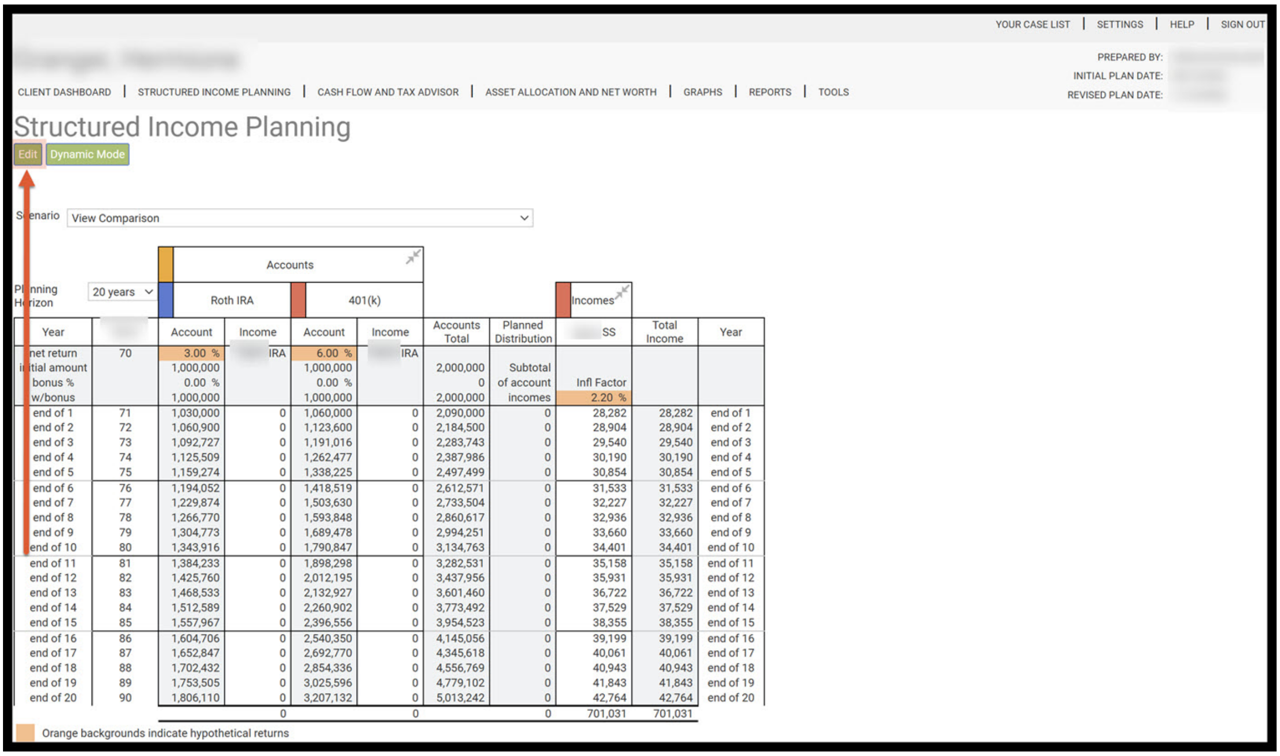
Step 21: Structured Income Planning Page: The Comparison Table will be removed from the Structured Income Plan.



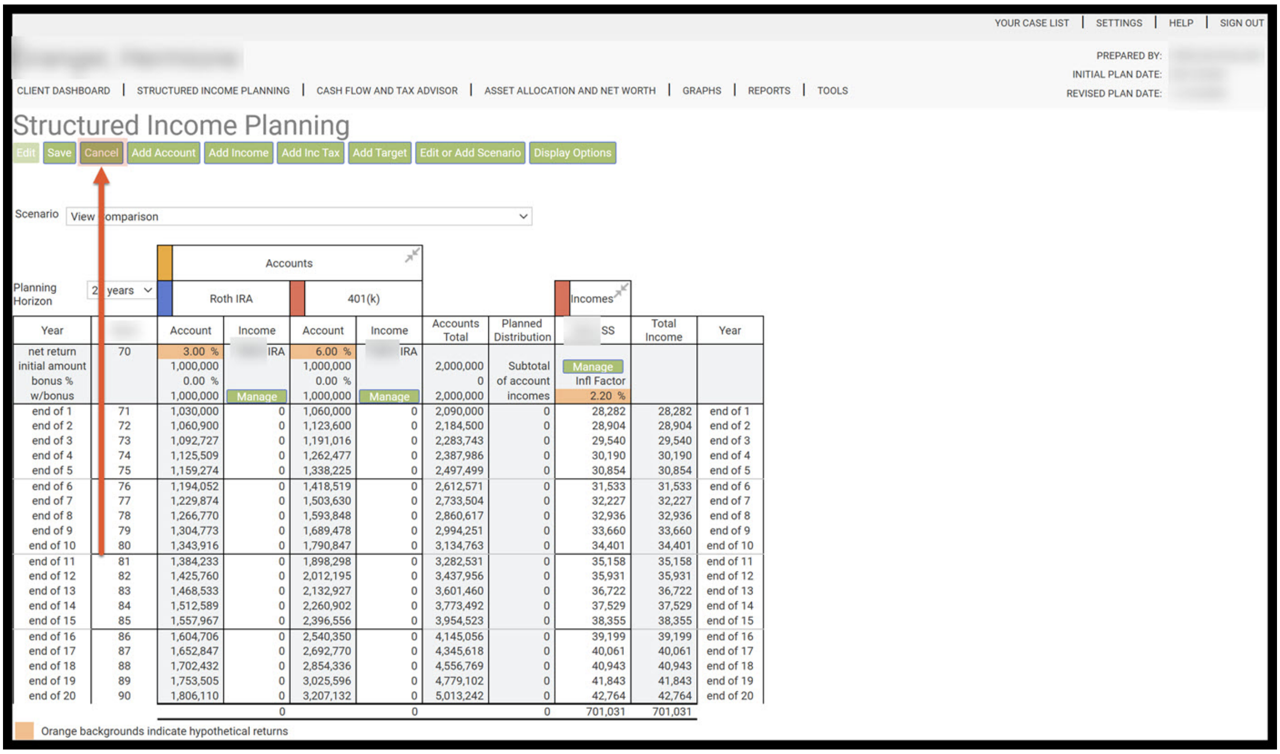
Step 22: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



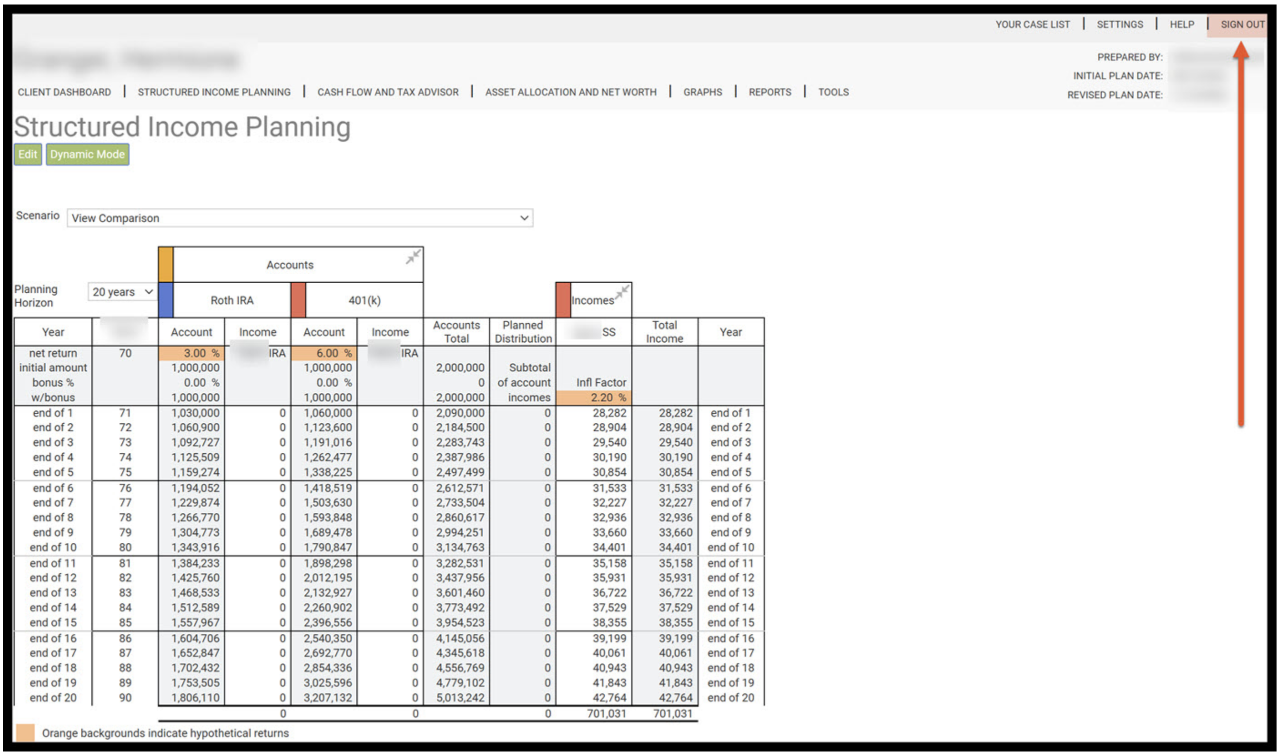
Step 23: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



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.



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.



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.