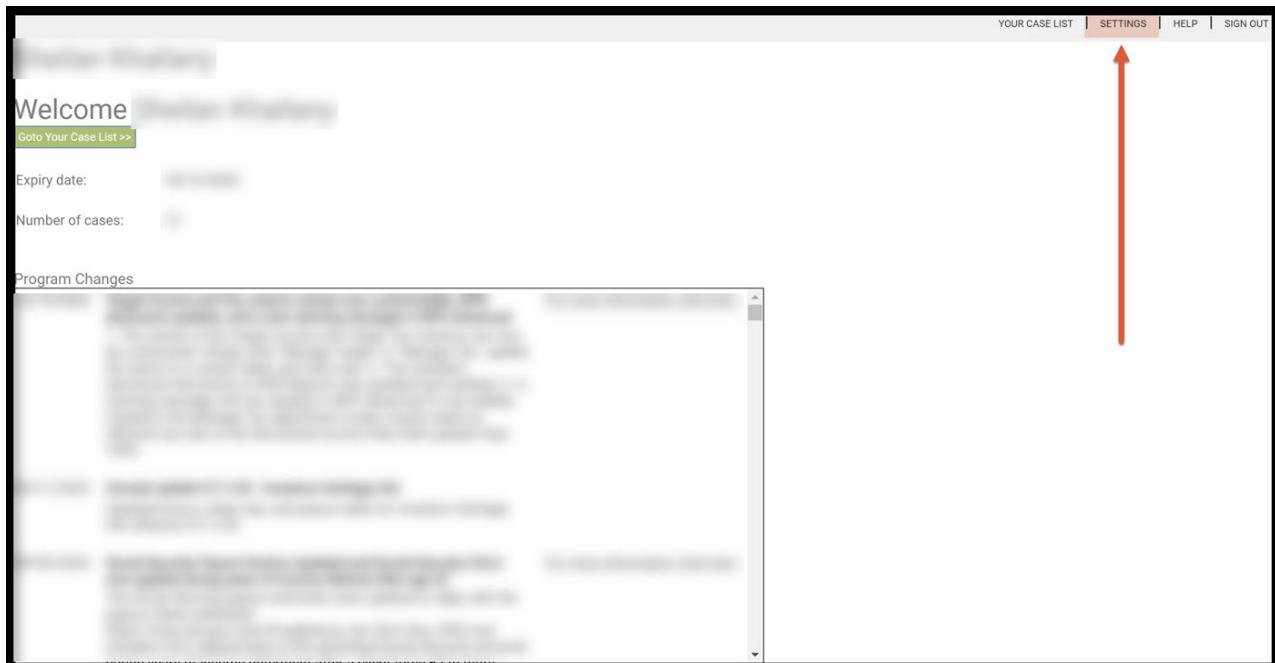


Creating Custom Rate Returns for the View Comparison Table

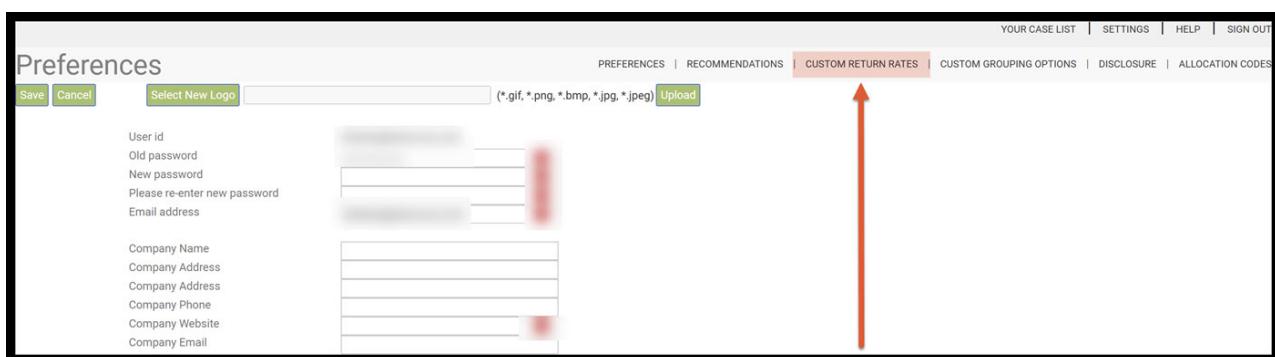
01/12/2026 11:18 am EST

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.

Custom Return Rates

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Save | Cancel

Custom Return Rate 1

Custom Return Rate 2

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

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

Custom Return Rates

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Save | Cancel

Custom Return Rate 1

Custom Return Rate 2

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

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

Custom Return Rates

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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.

Custom Return Rates

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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.

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

Client Information

[Edit](#) [Goto Incomes >>](#)

Case Title: ...

Description:

Client one

First	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="John"/>	Last	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="Doe"/>
Date of birth	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="1980-01-01"/>	Initial plan age	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="65"/>
Current age	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="35"/>	Retirement age	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="65"/>
Gender	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="button" value="Male"/> <input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="button" value="Female"/>		

Client two

First	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="Jane"/>	Last	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="Doe"/>
Date of birth	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="1980-01-01"/>	Initial plan age	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="65"/>
Current age	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="35"/>	Retirement age	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="65"/>
Gender	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="button" value="Male"/> <input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="button" value="Female"/>		

List Clients Beneficiaries (optional)

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

Selection tags Active

Initial plan date	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="2023-01-01"/>
Revision date	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="2023-01-01"/>
Address	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="123 Main St"/>
City, State, Zip	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="New York, NY 10001"/>
Email	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="johndoe@example.com"/>
Phone	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="123-456-7890"/>
Cell Phone	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="123-456-7890"/>
Cell Phone	<input style="width: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text" value="123-456-7890"/>

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*	
Planning Horizon	20 years	Roth IRA	401(k)	Accounts Total	Planned Distribution
Year		Account	Income	Account	Income
net return	70	3.00 %	IRA	6.00 %	IRA
initial amount		1,000,000		1,000,000	
bonus % w/bonus		0.00 %		0.00 %	
		1,000,000		1,000,000	
end of 1	71	1,030,000	0	1,060,000	0
end of 2	72	1,060,900	0	1,123,600	0
end of 3	73	1,092,727	0	1,191,016	0
end of 4	74	1,125,509	0	1,262,477	0
end of 5	75	1,159,274	0	1,338,225	0
end of 6	76	1,194,052	0	1,418,519	0
end of 7	77	1,229,874	0	1,503,630	0
end of 8	78	1,266,770	0	1,593,848	0
end of 9	79	1,304,773	0	1,689,478	0
end of 10	80	1,343,916	0	1,790,847	0
end of 11	81	1,384,233	0	1,898,298	0
end of 12	82	1,425,760	0	2,012,195	0
end of 13	83	1,468,533	0	2,132,927	0
end of 14	84	1,512,589	0	2,260,902	0
end of 15	85	1,557,967	0	2,396,556	0
end of 16	86	1,604,706	0	2,540,350	0
end of 17	87	1,652,847	0	2,692,770	0
end of 18	88	1,702,432	0	2,854,336	0
end of 19	89	1,753,505	0	3,025,596	0
end of 20	90	1,806,110	0	3,207,132	0
				0	701,031
				0	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

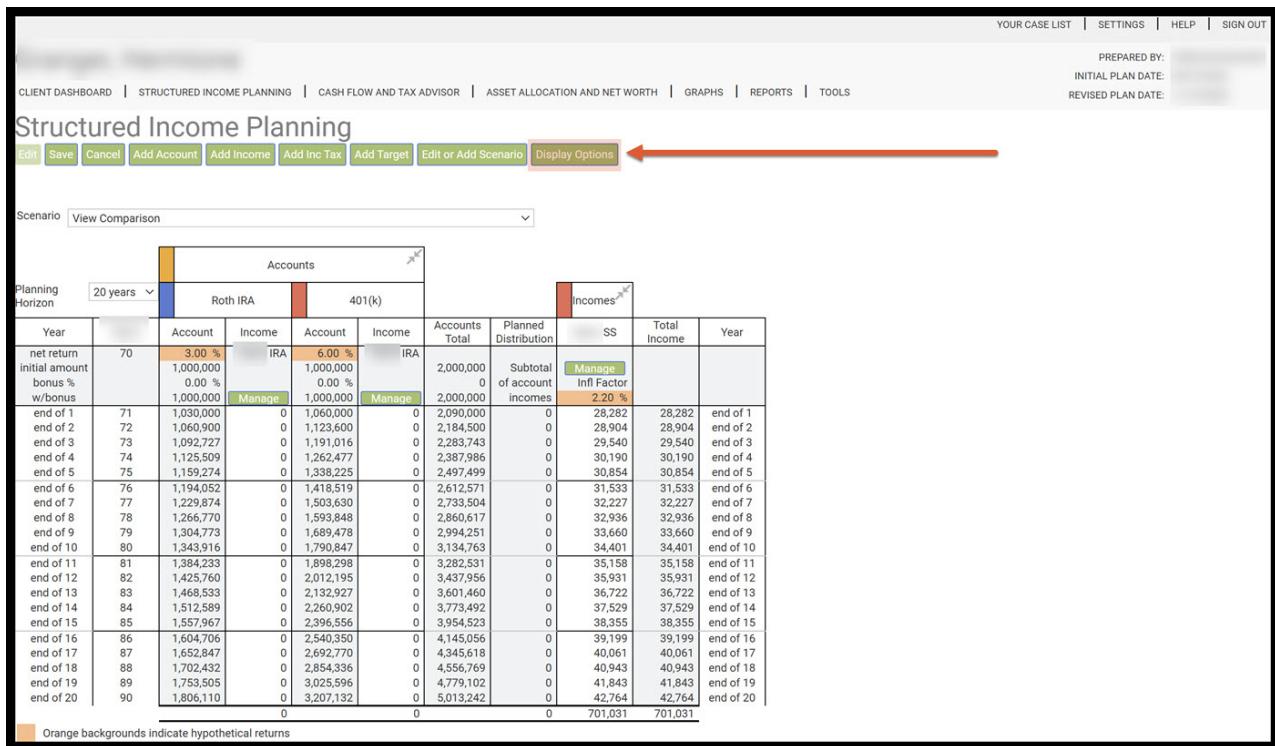
Planning Horizon: 20 years

		Accounts		Incomes*	
Planning Horizon	20 years	Roth IRA	401(k)	Accounts Total	Planned Distribution
Year		Account	Income	Account	Income
net return	70	3.00 %	IRA	6.00 %	IRA
initial amount		1,000,000		1,000,000	
bonus % w/bonus		0.00 %		0.00 %	
		1,000,000		1,000,000	
end of 1	71	1,030,000	0	1,060,000	0
end of 2	72	1,060,900	0	1,123,600	0
end of 3	73	1,092,727	0	1,191,016	0
end of 4	74	1,125,509	0	1,262,477	0
end of 5	75	1,159,274	0	1,338,225	0
end of 6	76	1,194,052	0	1,418,519	0
end of 7	77	1,229,874	0	1,503,630	0
end of 8	78	1,266,770	0	1,593,848	0
end of 9	79	1,304,773	0	1,689,478	0
end of 10	80	1,343,916	0	1,790,847	0
end of 11	81	1,384,233	0	1,898,298	0
end of 12	82	1,425,760	0	2,012,195	0
end of 13	83	1,468,533	0	2,132,927	0
end of 14	84	1,512,589	0	2,260,902	0
end of 15	85	1,557,967	0	2,396,556	0
end of 16	86	1,604,706	0	2,540,350	0
end of 17	87	1,652,847	0	2,692,770	0
end of 18	88	1,702,432	0	2,854,336	0
end of 19	89	1,753,505	0	3,025,596	0
end of 20	90	1,806,110	0	3,207,132	0
				0	701,031
				0	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 

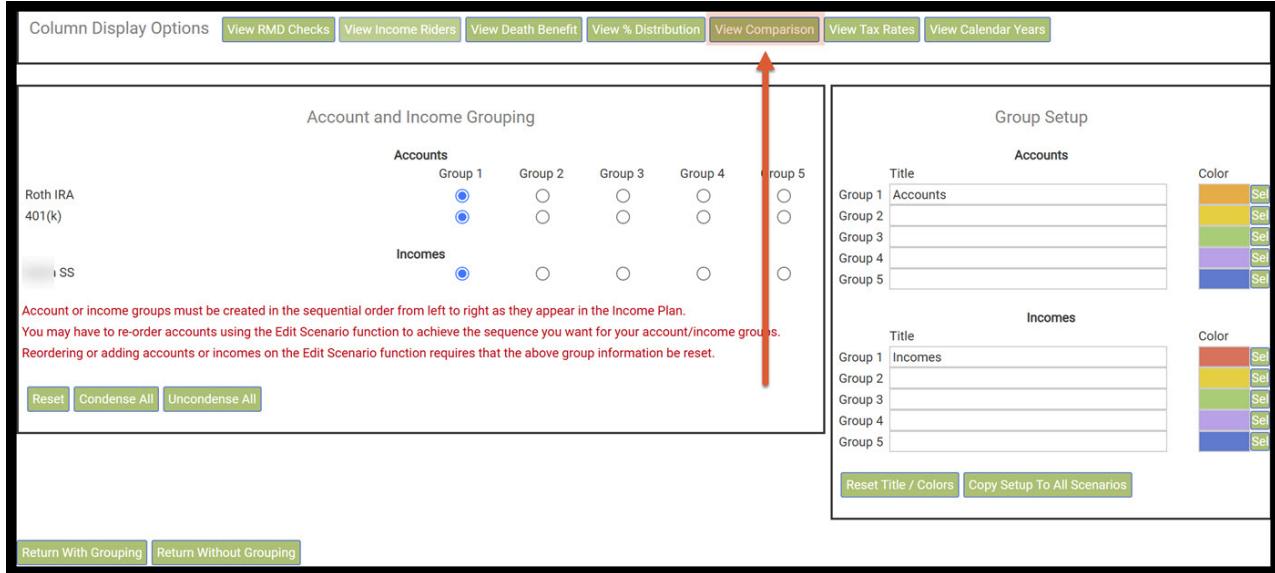
Scenario | View Comparison

Planning Horizon: 20 years

Year	Accounts		Incomes		SS	Total Income	Year
	Account	Income	Account	Income			
net return	3.00 %	IRA	6.00 %	IRA			
initial amount	1,000,000		1,000,000		2,000,000	Subtotal	
bonus % w/bonus	0.00 %		0.00 %		0	of account incomes	
	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
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 2,793,504	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.



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

	Group 1	Group 2	Group 3	Group 4	Group 5
Roth IRA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401(k)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

	Group 1	Group 2	Group 3	Group 4	Group 5
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts	<input type="text" value="Accounts"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Incomes

Title	Group 1	Group 2	Group 3	Group 4	Group 5
Incomes	<input type="text" value="Incomes"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Color

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: 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 Roth IRA 401(k) Incomes*

Year Account Income Account Income IRA Accounts Total Planned Distribution SS Total Income Year

net return 70 3.00 % IRA 6.00 % IRA 0 2,090,000 Subtotal 0 of account incomes 2.20 %

initial amount 1,000,000 0 1,000,000 0 2,000,000 Manage 0 2,000,000

bonus % w/bonus 0.00 % 0.00 % 0 2,283,743 0 2,283,743

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

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 Roth IRA 401(k) Incomes*

Year Account Income Account Income IRA Accounts Total Planned Distribution SS Total Income Year

net return 70 3.00 % IRA 6.00 % IRA 0 2,090,000 Subtotal 0 of account incomes 2.20 %

initial amount 1,000,000 0 1,000,000 0 2,000,000 Manage 0 2,000,000

bonus % w/bonus 0.00 % 0.00 % 0 2,283,743 0 2,283,743

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 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

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	3.00 %	IRA	6.00 %	IRA	2,000,000	Subtotal of account incomes	28,282	28,282	
initial amount	1,000,000		1,000,000		0		28,904	28,904	end of 1
bonus %	0.00 %		0.00 %		0		29,540	29,540	end of 2
w/bonus	1,000,000	Manage	1,000,000	Manage	2,000,000		30,190	30,190	end of 3
end of 1	1,030,000		0	1,060,000	0		30,854	30,854	end of 4
end of 2	1,060,900		0	1,123,600	0				end of 5
end of 3	1,092,727		0	1,191,016	0				end of 6
end of 4	1,125,509		0	1,262,477	0				end of 7
end of 5	1,159,274		0	1,338,225	0				end of 8
end of 6	1,194,052		0	1,418,519	0				end of 9
end of 7	1,229,874		0	1,503,630	0				end of 10
end of 8	1,266,770		0	1,593,848	0				end of 11
end of 9	1,304,773		0	1,689,478	0				end of 12
end of 10	1,343,916		0	1,790,847	0				end of 13
end of 11	1,384,233		0	1,898,298	0				end of 14
end of 12	1,425,760		0	2,012,195	0				end of 15
end of 13	1,468,533		0	2,132,927	0				end of 16
end of 14	1,512,589		0	2,260,902	0				end of 17
end of 15	1,557,967		0	2,396,556	0				end of 18
end of 16	1,604,706		0	2,540,350	0				end of 19
end of 17	1,652,847		0	2,692,770	0				end of 20
end of 18	1,702,432		0	2,854,336	0				
end of 19	1,753,505		0	3,025,596	0				
end of 20	1,806,110		0	3,207,132	0				
			0	0	0		701,031	701,031	

Orange backgrounds indicate hypothetical returns

Comparison

Total Account	Returns	Income
2,000,000		
Custom1		
2,200,000	10.00 %	0
2,398,000	9.00 %	0
2,589,840	8.00 %	0
2,771,129	7.00 %	0
2,937,396	6.00 %	0
3,084,266	5.00 %	0
3,207,637	4.00 %	0
3,303,866	3.00 %	0
3,369,943	2.00 %	0
3,403,642	1.00 %	0
3,403,642	0.00 %	0
3,369,606	-1.00 %	0
3,302,214	-2.00 %	0
3,203,148	-3.00 %	0
3,075,022	-4.00 %	0
2,921,271	-5.00 %	0
2,745,994	-6.00 %	0
2,553,775	-7.00 %	0
2,349,473	-8.00 %	0
2,138,020	-9.00 %	0

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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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

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return	3.00 %	IRA	6.00 %	IRA	2,000,000	Subtotal of account incomes	28,282	28,282	end of 1
initial amount	1,000,000		1,000,000		0		28,904	28,904	end of 2
bonus %	0.00 %		0.00 %		0		29,540	29,540	end of 3
w/bonus	1,000,000	Manage	1,000,000	Manage	2,000,000		30,190	30,190	end of 4
end of 1	1,030,000		0	1,060,000	0		30,854	30,854	end of 5
end of 2	1,060,900		0	1,123,600	0				end of 6
end of 3	1,092,727		0	1,191,016	0				end of 7
end of 4	1,125,509		0	1,262,477	0				end of 8
end of 5	1,159,274		0	1,338,225	0				end of 9
end of 6	1,194,052		0	1,418,519	0				end of 10
end of 7	1,229,874		0	1,503,630	0				end of 11
end of 8	1,266,770		0	1,593,848	0				end of 12
end of 9	1,304,773		0	1,689,478	0				end of 13
end of 10	1,343,916		0	1,790,847	0				end of 14
end of 11	1,384,233		0	1,898,298	0				end of 15
end of 12	1,425,760		0	2,012,195	0				end of 16
end of 13	1,468,533		0	2,132,927	0				end of 17
end of 14	1,512,589		0	2,260,902	0				end of 18
end of 15	1,557,967		0	2,396,556	0				end of 19
end of 16	1,604,706		0	2,540,350	0				end of 20
end of 17	1,652,847		0	2,692,770	0				
end of 18	1,702,432		0	2,854,336	0				
end of 19	1,753,505		0	3,025,596	0				
end of 20	1,806,110		0	3,207,132	0				
		0	0	0	0		701,031	701,031	

Comparison

Total Account	Returns	Income
2,000,000		
Custom1		
2,200,000	10.00 %	0
2,398,000	9.00 %	0
2,589,840	8.00 %	0
2,771,129	7.00 %	0
2,937,396	6.00 %	0
3,084,266	5.00 %	0
3,207,637	4.00 %	0
3,303,866	3.00 %	0
3,369,943	2.00 %	0
3,403,642	1.00 %	0
3,403,642	0.00 %	0
3,369,606	-1.00 %	0
3,302,214	-2.00 %	0
3,203,148	-3.00 %	0
3,075,022	-4.00 %	0
2,921,271	-5.00 %	0
2,745,994	-6.00 %	0
2,553,775	-7.00 %	0
2,349,473	-8.00 %	0
2,138,020	-9.00 %	0

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:
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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					
Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income	
net return	3.00 %	IRA	6.00 %	IRA	2,000,000	Subtotal of account incomes	Manage Infl Factor 2.20 %			2,000,000	Custom2		
initial amount	1,000,000	1,000,000	0	0	0					1,800,000	-10.00 %	0	
bonus % w/bonus	0.00 %	0.00 %	0	0	0					1,638,000	-9.00 %	0	
	1,000,000	1,000,000	Manage	1,000,000	2,000,000					1,506,960	-8.00 %	0	
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	0	28,282	end of 1	1,401,473	-7.00 %	0	
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	0	28,904	end of 2	1,317,384	-6.00 %	0	
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	0	29,540	end of 3	1,251,515	-5.00 %	0	
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	0	30,190	end of 4	1,201,454	-4.00 %	0	
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	0	30,854	end of 5	1,165,411	-3.00 %	0	
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	0	31,533	end of 6	1,142,103	-2.00 %	0	
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	0	32,227	end of 7	1,130,682	0.00 %	0	
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	0	32,936	end of 8	1,116,411	-1.00 %	0	
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	0	33,660	end of 9	1,114,103	-0.00 %	0	
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	0	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	end of 11	1,124,764	-0.00 %	0	
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	0	35,931	end of 12	1,124,764	-0.00 %	0	
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	0	36,722	end of 13	1,116,411	-3.00 %	0	
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	0	37,529	end of 14	1,114,103	-2.00 %	0	
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	0	38,355	end of 15	1,114,103	-3.00 %	0	
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	0	39,199	end of 16	1,114,103	-2.00 %	0	
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	0	40,061	end of 17	1,114,103	-1.00 %	0	
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	0	40,943	end of 18	1,114,103	-0.00 %	0	
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	0	41,843	end of 19	1,114,103	-0.00 %	0	
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	0	42,764	end of 20	1,114,103	-0.00 %	0	
					0	701,031	0	701,031		0	701,031	0	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

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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

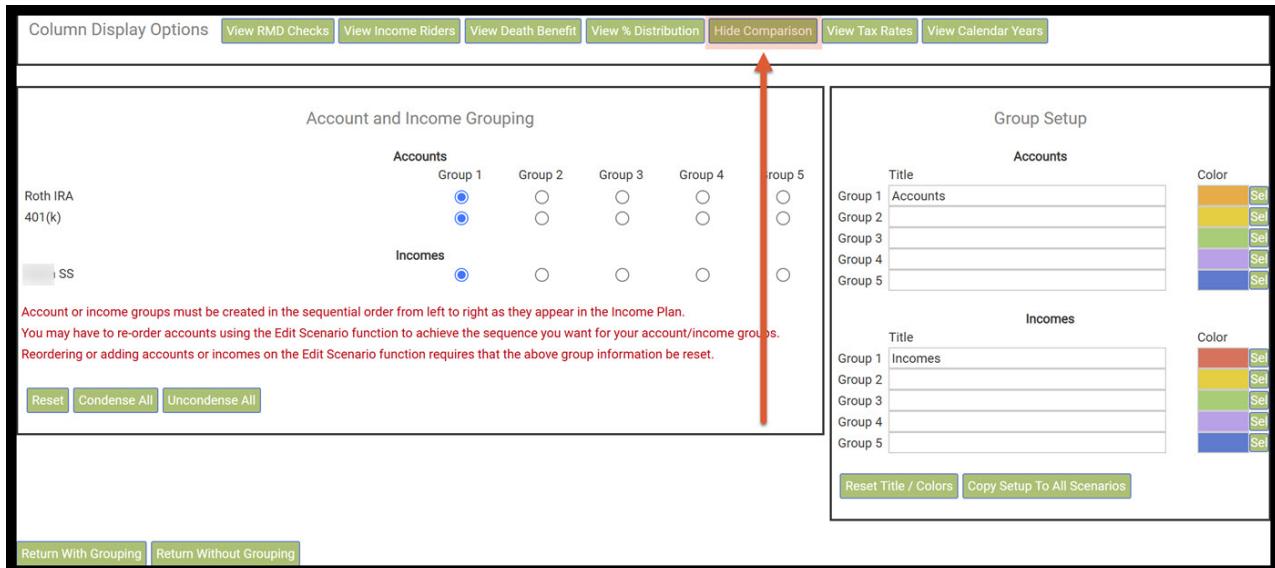
Scenario View Comparison

Planning Horizon 20 years

Accounts				Incomes*				Comparison					
Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year	Total Account	Returns	Income	
net return	3.00 %	IRA	6.00 %	IRA	2,000,000	Subtotal of account incomes	Manage Infl Factor 2.20 %			2,000,000	Custom2		
initial amount	1,000,000	1,000,000	0	0	0					1,800,000	-10.00 %	0	
bonus % w/bonus	0.00 %	0.00 %	0	0	0					1,638,000	-9.00 %	0	
	1,000,000	1,000,000	Manage	1,000,000	2,000,000					1,506,960	-8.00 %	0	
end of 1	71	1,030,000	0	1,060,000	0	2,090,000	0	28,282	end of 1	1,401,473	-7.00 %	0	
end of 2	72	1,060,900	0	1,123,600	0	2,184,500	0	28,904	end of 2	1,317,384	-6.00 %	0	
end of 3	73	1,092,727	0	1,191,016	0	2,283,743	0	29,540	end of 3	1,251,515	-5.00 %	0	
end of 4	74	1,125,509	0	1,262,477	0	2,387,986	0	30,190	end of 4	1,201,454	-4.00 %	0	
end of 5	75	1,159,274	0	1,338,225	0	2,497,499	0	30,854	end of 5	1,165,411	-3.00 %	0	
end of 6	76	1,194,052	0	1,418,519	0	2,612,571	0	31,533	end of 6	1,142,103	-2.00 %	0	
end of 7	77	1,229,874	0	1,503,630	0	2,733,504	0	32,227	end of 7	1,130,682	0.00 %	0	
end of 8	78	1,266,770	0	1,593,848	0	2,860,617	0	32,936	end of 8	1,116,411	-1.00 %	0	
end of 9	79	1,304,773	0	1,689,478	0	2,994,251	0	33,660	end of 9	1,114,103	-0.00 %	0	
end of 10	80	1,343,916	0	1,790,847	0	3,134,763	0	34,401	end of 10	1,114,103	-0.00 %	0	
end of 11	81	1,384,233	0	1,898,298	0	3,282,531	0	35,158	end of 11	1,114,103	-0.00 %	0	
end of 12	82	1,425,760	0	2,012,195	0	3,437,956	0	35,931	end of 12	1,114,103	-0.00 %	0	
end of 13	83	1,468,533	0	2,132,927	0	3,601,460	0	36,722	end of 13	1,114,103	-0.00 %	0	
end of 14	84	1,512,589	0	2,260,902	0	3,773,492	0	37,529	end of 14	1,114,103	-0.00 %	0	
end of 15	85	1,557,967	0	2,396,556	0	3,954,523	0	38,355	end of 15	1,114,103	-0.00 %	0	
end of 16	86	1,604,706	0	2,540,350	0	4,145,056	0	39,199	end of 16	1,114,103	-0.00 %	0	
end of 17	87	1,652,847	0	2,692,770	0	4,345,618	0	40,061	end of 17	1,114,103	-0.00 %	0	
end of 18	88	1,702,432	0	2,854,336	0	4,556,769	0	40,943	end of 18	1,114,103	-0.00 %	0	
end of 19	89	1,753,505	0	3,025,596	0	4,779,102	0	41,843	end of 19	1,114,103	-0.00 %	0	
end of 20	90	1,806,110	0	3,207,132	0	5,013,242	0	42,764	end of 20	1,114,103	-0.00 %	0	
					0	701,031	0	701,031		0	701,031	0	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	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401(k)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

	Group 1	Group 2	Group 3	Group 4	Group 5
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

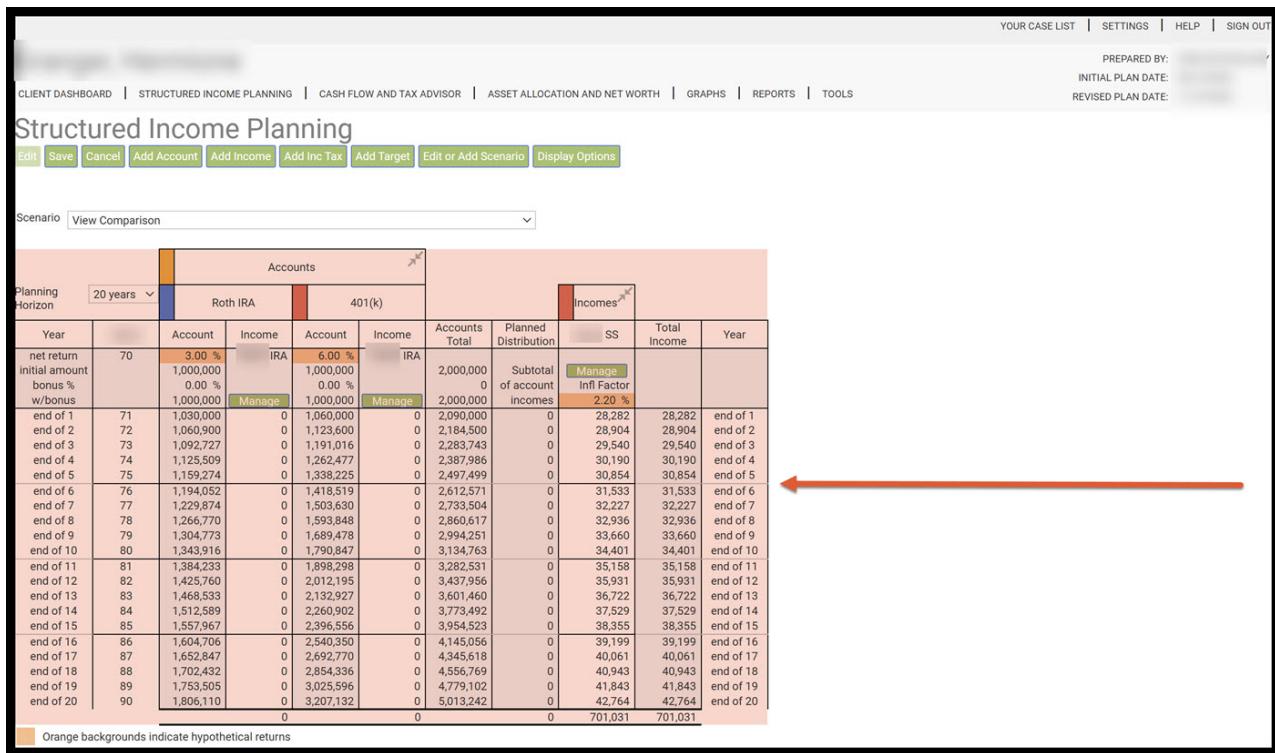
Incomes

Title	Color
Group 1 Incomes	<input checked="" type="radio"/>
Group 2	<input type="radio"/>
Group 3	<input type="radio"/>
Group 4	<input type="radio"/>
Group 5	<input type="radio"/>

[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

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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

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

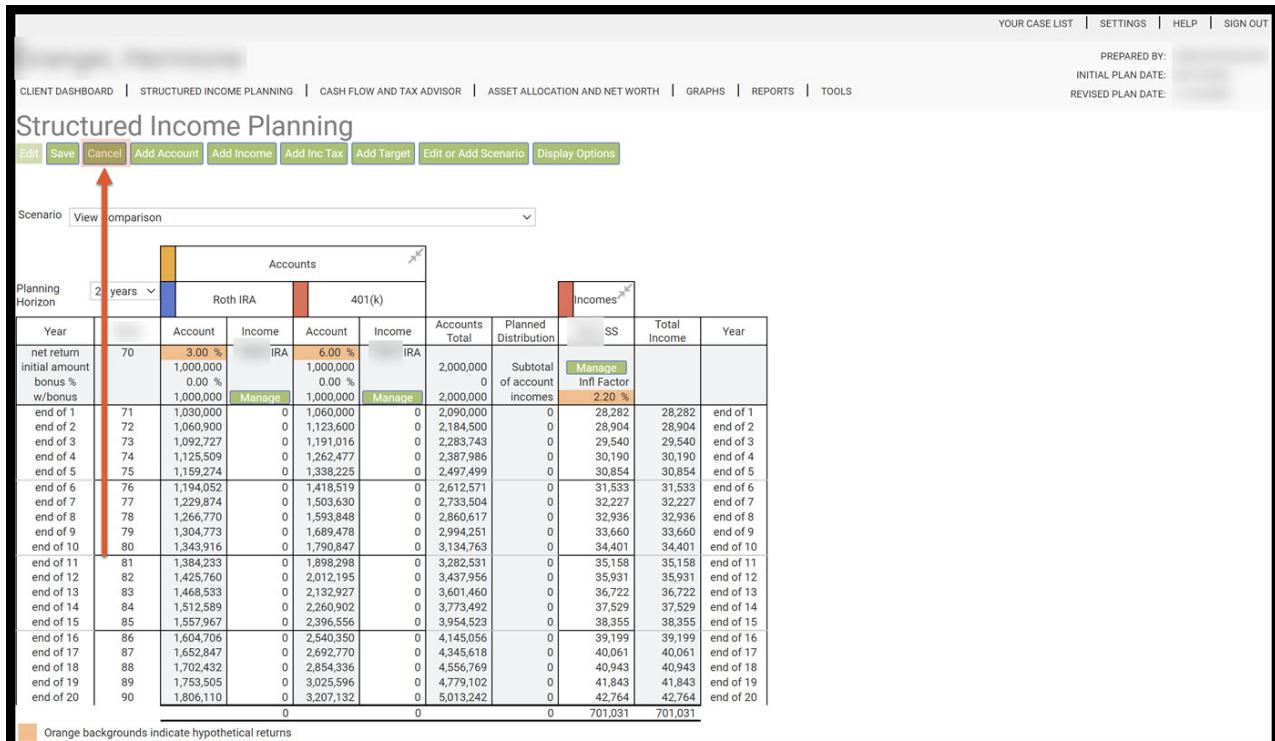
Scenario View Comparison

Planning Horizon: 20 years

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

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Structured Income Planning

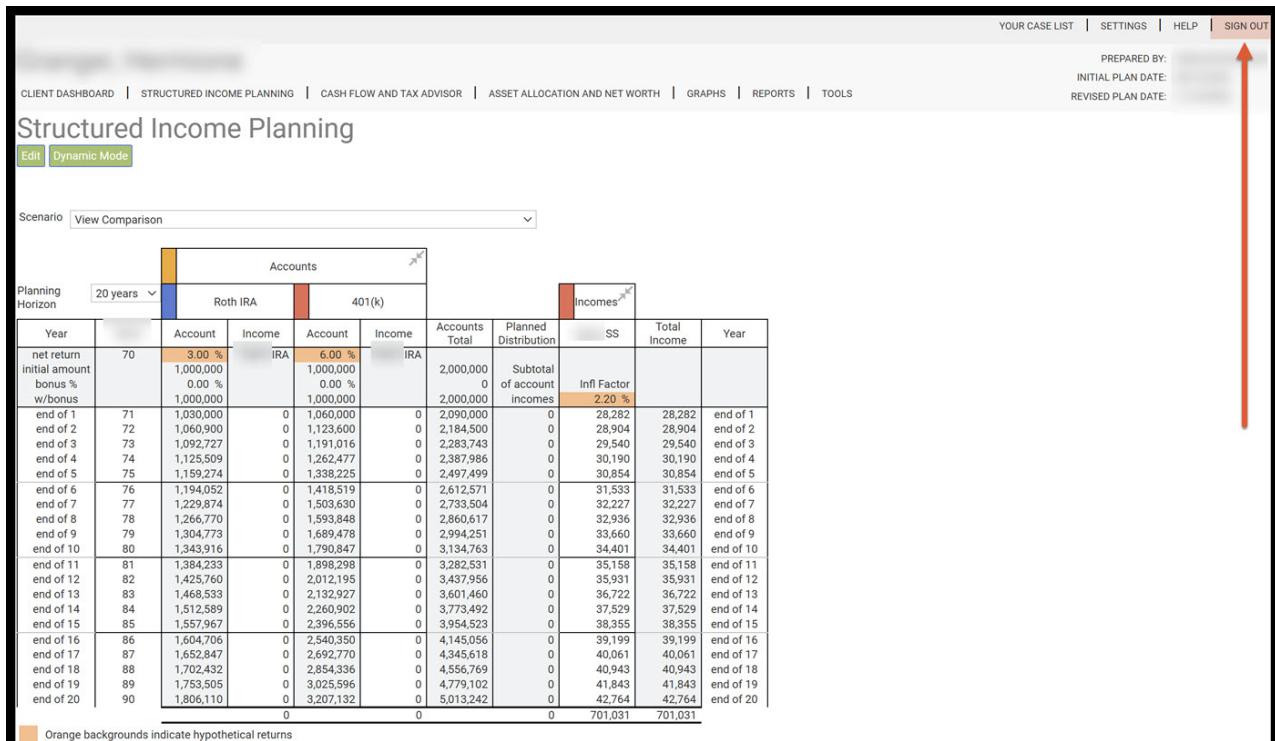
Edit | Save | **Cancel** | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario | View | Comparison | 2 years

		Accounts				Incomes					
Planning Horizon	2 years	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	2,000,000	Subtotal of account incomes	Manage	Infl Factor		
initial amount		1,000,000		1,000,000		0	2,000,000		2.20 %		
bonus % w/bonus		0.00 %		0.00 %		0	0				
		1,000,000		1,000,000		0	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	701,031	0	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:
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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 | **Dynamic Mode**

Scenario | View Comparison | 20 years

		Accounts				Incomes					
Planning Horizon	20 years	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	2,000,000	Subtotal of account incomes	Infl Factor			
initial amount		1,000,000		1,000,000		0	2,000,000	2.20 %			
bonus % w/bonus		0.00 %		0.00 %		0	0				
		1,000,000		1,000,000		0	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	701,031	0	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: support@plancout.com.

