

Condense All and Uncondense All Function

01/12/2026 11:15 am EST

If you have a structured income plan with many individual accounts and income sources, there is a function to consolidate all of these columns. Below is a step-by-step guideline for condensing and un-condensing all functions.

Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation tabs: CLIENT DASHBOARD, STRUCTURED INCOME PLANNING, CASH FLOW AND TAX ADVISOR, ASSET ALLOCATION AND NET WORTH, GRAPHS, REPORTS, TOOLS. On the right, there are options for YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below the navigation, there are fields for PREPARED BY, INITIAL PLAN DATE, and REVISED PLAN DATE. The main heading is 'Structured Income Planning' with an 'Edit' button and 'Dynamic Mode' text. A dropdown menu shows the scenario 'Condense All and Uncondense All Function'. Below this, there are sections for 'Accounts' and 'Incomes'. The 'Accounts' section includes 'Checkings/Savings Account', 'Individual Roth IRA', and '401(k)'. The 'Incomes' section includes 'Wages', 'SS', and 'VRBO'. A large table follows, with columns for Year, Account, Income, Accounts Total, Planned Distribution, Wages, SS, VRBO, Total Income, and Year. The table contains data for years 50 through 70. Orange backgrounds indicate hypothetical returns. At the bottom, a note states: 'Orange backgrounds indicate hypothetical returns'.

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	VRBO	Total Income	Year
net return	50	0.00 %		5.20 %		3.70 %	IRA	2,525,000					
initial amount		175,000		1,500,000		850,000		0					
bonus %		0.00 %		0.00 %		0.00 %		0					
w/bonus		175,000		1,500,000		850,000	2,525,000	0					
end of 1	51	175,002	0	1,578,000	0	881,450	2,634,452	0	150,000	0	14,400	164,400	end of 1
end of 2	52	175,004	0	1,660,056	0	914,064	2,749,123	0	153,000	0	15,120	168,120	end of 2
end of 3	53	175,005	0	1,746,379	0	947,884	2,869,268	0	156,060	0	15,876	171,936	end of 3
end of 4	54	175,007	0	1,837,191	0	982,956	2,995,154	0	159,181	0	16,670	175,851	end of 4
end of 5	55	175,009	0	1,932,725	0	1,019,325	3,127,058	0	162,365	0	17,503	179,868	end of 5
end of 6	56	175,010	0	2,033,227	0	1,057,040	3,265,277	0	165,612	0	18,378	183,991	end of 6
end of 7	57	175,012	0	2,138,955	0	1,096,150	3,410,117	0	168,924	0	19,297	188,222	end of 7
end of 8	58	175,014	0	2,250,180	0	1,136,708	3,561,902	0	172,303	0	20,262	192,565	end of 8
end of 9	59	175,016	0	2,367,190	0	1,178,766	3,720,972	0	175,749	0	21,275	197,024	end of 9
end of 10	60	175,018	0	2,490,284	0	1,222,380	3,887,682	0	179,264	0	22,339	201,603	end of 10
end of 11	61	175,019	0	2,619,779	0	1,267,608	4,062,406	0	182,849	0	23,456	206,305	end of 11
end of 12	62	175,021	0	2,756,008	0	1,314,509	4,245,538	0	186,506	0	24,629	211,135	end of 12
end of 13	63	175,023	0	2,899,320	0	1,363,146	4,437,489	0	190,236	0	25,860	216,097	end of 13
end of 14	64	175,024	0	3,050,085	0	1,413,582	4,638,692	0	194,041	0	27,153	221,194	end of 14
end of 15	65	175,026	0	3,208,690	0	1,465,885	4,849,601	0	0	37,334	28,511	65,845	end of 15
end of 16	66	175,028	0	3,375,542	0	1,520,123	5,070,692	0	0	38,267	29,937	68,204	end of 16
end of 17	67	175,030	0	3,551,070	0	1,576,367	5,302,466	0	0	39,224	31,433	70,657	end of 17
end of 18	68	175,032	0	3,735,726	0	1,634,693	5,545,450	0	0	40,205	33,005	73,210	end of 18
end of 19	69	175,033	0	3,929,984	0	1,695,176	5,800,193	0	0	41,210	34,655	75,865	end of 19
end of 20	70	175,035	0	4,134,343	0	1,757,898	6,067,276	0	0	42,240	0	42,240	end of 20
			0		0		0	0	2,396,090	238,480	439,761	3,074,332	

Step 2: Display Options: Click on the green Display Option 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 | REPORTS | TOOLS

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

Structured Income Planning

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

Scenario: Condense All and Uncondense All Function

Year	Account	Income	Accounts			Accounts Total	Planned Distribution	Incomes			Total Income	Year
			Checkings/Savings Account	Individual Roth IRA	401(k)			Wages	SS	VRBO		
net return	50	0.00 %	5.20 %	3.70 %		2,525,000		Manage	Manage	Manage		
initial amount		175,000	1,500,000	850,000		0						
bonus %		0.00 %	0.00 %	0.00 %		0						
w/bonus		175,000	1,500,000	850,000		2,525,000		2.00 %	2.50 %	5.00 %		
end of 1	51	175,002	0	1,578,000	0	881,450	0	150,000	0	14,400	164,400	end of 1
end of 2	52	175,004	0	1,660,056	0	914,064	0	153,000	0	15,120	168,120	end of 2
end of 3	53	175,005	0	1,746,379	0	947,884	0	156,060	0	15,876	171,936	end of 3
end of 4	54	175,007	0	1,837,191	0	982,956	0	159,181	0	16,670	175,851	end of 4
end of 5	55	175,009	0	1,932,725	0	1,019,325	0	162,365	0	17,503	179,868	end of 5
end of 6	56	175,010	0	2,033,227	0	1,057,040	0	165,612	0	18,378	183,991	end of 6
end of 7	57	175,012	0	2,138,955	0	1,096,150	0	168,924	0	19,297	188,222	end of 7
end of 8	58	175,014	0	2,250,180	0	1,136,708	0	172,303	0	20,262	192,565	end of 8
end of 9	59	175,016	0	2,367,190	0	1,178,766	0	175,749	0	21,275	197,024	end of 9
end of 10	60	175,018	0	2,490,284	0	1,222,380	0	179,264	0	22,339	201,603	end of 10
end of 11	61	175,019	0	2,619,779	0	1,267,608	0	182,849	0	23,456	206,305	end of 11
end of 12	62	175,021	0	2,756,008	0	1,314,509	0	186,506	0	24,629	211,135	end of 12
end of 13	63	175,023	0	2,899,320	0	1,363,146	0	190,236	0	25,860	216,097	end of 13
end of 14	64	175,024	0	3,050,085	0	1,413,582	0	194,041	0	27,153	221,194	end of 14
end of 15	65	175,026	0	3,208,690	0	1,465,885	0	197,885	37,334	28,511	226,396	end of 15
end of 16	66	175,028	0	3,375,542	0	1,520,123	0	201,767	38,267	29,937	231,704	end of 16
end of 17	67	175,030	0	3,551,070	0	1,576,367	0	205,692	39,224	31,433	237,125	end of 17
end of 18	68	175,032	0	3,735,726	0	1,634,693	0	209,603	40,205	33,005	242,808	end of 18
end of 19	69	175,033	0	3,929,984	0	1,695,176	0	213,500	41,210	34,655	248,765	end of 19
end of 20	70	175,035	0	4,134,343	0	1,757,898	0	217,383	42,240	36,365	254,988	end of 20
			0	0	0	0	0	2,396,090	238,480	439,761	3,074,332	

Orange backgrounds indicate hypothetical returns

Step 3: Condense All: Click on the green Condense All button located in the Account and Income Grouping table.

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

Account and Income Grouping

	Group 1	Group 2	Group 3	Group 4	Group 5
Checkings/Savings Account	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual 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"/>
Wages	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VRBO	<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	Incomes
Group 1 Accounts	Group 1 Incomes
Group 2	Group 2
Group 3	Group 3
Group 4	Group 4
Group 5	Group 5

Reset Title / Colors Copy Setup To All Scenarios

Return With Grouping Return Without Grouping

Step 4: Structured Income Planning Page: The accounts and income columns have been condensed into two separate columns: Accounts Group and Income Group.

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: Condense All and Uncondense All Function

Planning Horizon: 20 years

Year	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	50	2,525,000	2,525,000	0			
initial amount		2,525,000	2,525,000	0			
bonus % w/bonus		2,525,000	2,525,000	0			
end of 1	51	2,634,452	2,634,452	0	164,400	164,400	end of 1
end of 2	52	2,749,123	2,749,123	0	168,120	168,120	end of 2
end of 3	53	2,869,268	2,869,268	0	171,936	171,936	end of 3
end of 4	54	2,995,154	2,995,154	0	175,851	175,851	end of 4
end of 5	55	3,127,058	3,127,058	0	179,868	179,868	end of 5
end of 6	56	3,265,277	3,265,277	0	183,991	183,991	end of 6
end of 7	57	3,410,117	3,410,117	0	188,222	188,222	end of 7
end of 8	58	3,561,902	3,561,902	0	192,565	192,565	end of 8
end of 9	59	3,720,972	3,720,972	0	197,024	197,024	end of 9
end of 10	60	3,887,682	3,887,682	0	201,603	201,603	end of 10
end of 11	61	4,062,406	4,062,406	0	206,305	206,305	end of 11
end of 12	62	4,245,538	4,245,538	0	211,135	211,135	end of 12
end of 13	63	4,437,489	4,437,489	0	216,097	216,097	end of 13
end of 14	64	4,638,692	4,638,692	0	221,194	221,194	end of 14
end of 15	65	4,849,601	4,849,601	0	65,845	65,845	end of 15
end of 16	66	5,070,692	5,070,692	0	68,204	68,204	end of 16
end of 17	67	5,302,467	5,302,466	0	70,657	70,657	end of 17
end of 18	68	5,545,450	5,545,450	0	73,210	73,210	end of 18
end of 19	69	5,800,193	5,800,193	0	75,865	75,865	end of 19
end of 20	70	6,067,275	6,067,276	0	42,240	42,240	end of 20
		0	0	0	3,074,332	3,074,332	

Orange backgrounds indicate hypothetical returns

Step 5: 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: Condense All and Uncondense All Function

Planning Horizon: 20 years

Year	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	50	2,525,000	2,525,000	0			
initial amount		2,525,000	2,525,000	0			
bonus % w/bonus		2,525,000	2,525,000	0			
end of 1	51	2,634,452	2,634,452	0	164,400	164,400	end of 1
end of 2	52	2,749,123	2,749,123	0	168,120	168,120	end of 2
end of 3	53	2,869,268	2,869,268	0	171,936	171,936	end of 3
end of 4	54	2,995,154	2,995,154	0	175,851	175,851	end of 4
end of 5	55	3,127,058	3,127,058	0	179,868	179,868	end of 5
end of 6	56	3,265,277	3,265,277	0	183,991	183,991	end of 6
end of 7	57	3,410,117	3,410,117	0	188,222	188,222	end of 7
end of 8	58	3,561,902	3,561,902	0	192,565	192,565	end of 8
end of 9	59	3,720,972	3,720,972	0	197,024	197,024	end of 9
end of 10	60	3,887,682	3,887,682	0	201,603	201,603	end of 10
end of 11	61	4,062,406	4,062,406	0	206,305	206,305	end of 11
end of 12	62	4,245,538	4,245,538	0	211,135	211,135	end of 12
end of 13	63	4,437,489	4,437,489	0	216,097	216,097	end of 13
end of 14	64	4,638,692	4,638,692	0	221,194	221,194	end of 14
end of 15	65	4,849,601	4,849,601	0	65,845	65,845	end of 15
end of 16	66	5,070,692	5,070,692	0	68,204	68,204	end of 16
end of 17	67	5,302,467	5,302,466	0	70,657	70,657	end of 17
end of 18	68	5,545,450	5,545,450	0	73,210	73,210	end of 18
end of 19	69	5,800,193	5,800,193	0	75,865	75,865	end of 19
end of 20	70	6,067,275	6,067,276	0	42,240	42,240	end of 20
		0	0	0	3,074,332	3,074,332	

Orange backgrounds indicate hypothetical returns

Step 6: Uncondense All: Click on the green Uncondense All button located in the Account and Income Grouping table.

Column Display Options: [View RMD Checks](#) [Hide 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
Checkings/Savings Account	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual 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
Wages	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VRBO	<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

Group	Title	Color
Group 1	Accounts	Set
Group 2		Set
Group 3		Set
Group 4		Set
Group 5		Set

Incomes

Group	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 7: Structured Income Planning Page: The accounts and income columns have been individualized out.

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

Structured Income Planning

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

Scenario: Condense All and Uncondense All Function

Year	Planning Horizon	Accounts						Accounts Total	Planned Distribution	Incomes			Total Income	Year
		Checkings/Savings Account		Individual Roth IRA		401(k)				Wages	SS	VRBO		
		Account	Income	Account	Income	Account	Income							
net return	50	0.00 %		5.20 %		3.70 %		2,525,000		Manage	Manage	Manage		
initial amount		175,000		1,500,000		850,000		2,525,000		Infl Factor	Infl Factor	Infl Factor		
bonus %		0.00 %		0.00 %		0.00 %		0						
w/bonus		175,000	Manage	1,500,000	Manage	850,000	Manage	2,525,000	Subtotal of account incomes	2.00 %	2.50 %	5.00 %		
end of 1	51	175,002	0	1,578,000	0	881,450	0	2,634,452	0	150,000	0	14,400	164,400	end of 1
end of 2	52	175,004	0	1,660,056	0	914,064	0	2,749,123	0	153,000	0	15,120	168,120	end of 2
end of 3	53	175,005	0	1,746,379	0	947,884	0	2,869,268	0	156,060	0	15,876	171,936	end of 3
end of 4	54	175,007	0	1,837,191	0	982,956	0	2,995,154	0	159,181	0	16,670	175,851	end of 4
end of 5	55	175,009	0	1,932,725	0	1,019,325	0	3,127,058	0	162,365	0	17,503	179,868	end of 5
end of 6	56	175,010	0	2,033,227	0	1,057,040	0	3,265,277	0	165,612	0	18,378	183,991	end of 6
end of 7	57	175,012	0	2,138,955	0	1,096,150	0	3,410,117	0	169,924	0	19,297	188,222	end of 7
end of 8	58	175,014	0	2,250,180	0	1,136,708	0	3,561,902	0	173,303	0	20,262	192,565	end of 8
end of 9	59	175,016	0	2,367,190	0	1,178,766	0	3,720,972	0	175,749	0	21,275	197,024	end of 9
end of 10	60	175,018	0	2,490,284	0	1,222,380	0	3,887,682	0	179,264	0	22,339	201,603	end of 10
end of 11	61	175,019	0	2,619,779	0	1,267,608	0	4,062,406	0	182,849	0	23,456	206,305	end of 11
end of 12	62	175,021	0	2,756,008	0	1,314,509	0	4,245,538	0	186,506	0	24,629	211,135	end of 12
end of 13	63	175,023	0	2,899,320	0	1,363,146	0	4,437,489	0	190,236	0	25,860	216,097	end of 13
end of 14	64	175,024	0	3,050,085	0	1,413,582	0	4,638,692	0	194,041	0	27,153	221,194	end of 14
end of 15	65	175,026	0	3,208,690	0	1,465,885	0	4,849,601	0	0	37,334	28,511	65,845	end of 15
end of 16	66	175,028	0	3,375,542	0	1,520,123	0	5,070,692	0	38,267	29,937	38,267	68,204	end of 16
end of 17	67	175,030	0	3,551,070	0	1,576,367	0	5,302,466	0	39,224	31,433	39,224	70,657	end of 17
end of 18	68	175,032	0	3,735,726	0	1,634,693	0	5,545,450	0	40,205	33,005	40,205	73,210	end of 18
end of 19	69	175,033	0	3,929,984	0	1,695,176	0	5,800,193	0	41,210	34,655	41,210	75,865	end of 19
end of 20	70	175,035	0	4,134,343	0	1,757,898	0	6,067,276	0	42,240	0	42,240	78,605	end of 20
										2,396,090	238,480	439,761	3,074,332	

Orange backgrounds indicate hypothetical returns

Step 8: Accounts Diagonal Carrot Arrows: In the Accounts table cell, click on the diagonal carrot arrow located in the upper right-hand corner of the cell.

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: Condense All and Uncondense All Function

Planning Horizon: 20 years

Year	Accounts						Accounts Total	Planned Distribution	Incomes			Total Income	Year	
	Account	Income	Account	Income	Account	Income			Wages	SS	VRBO			
net return	50	0.00 %		5.20 %		3.70 %	2,525,000							
initial amount		175,000		1,500,000		850,000	0							
bonus %		0.00 %		0.00 %		0.00 %								
w/bonus		175,000	Manage	1,500,000	Manage	850,000	2,525,000	Subtotal of account incomes	Manage Infl Factor 2.00 %	Manage Infl Factor 2.50 %	Manage Infl Factor 5.00 %			
end of 1	51	175,002	0	1,578,000	0	881,450	2,634,452	0	150,000	0	14,400	164,400	end of 1	
end of 2	52	175,004	0	1,660,056	0	914,064	2,749,123	0	153,000	0	15,120	168,120	end of 2	
end of 3	53	175,005	0	1,746,379	0	947,884	2,869,268	0	156,060	0	15,876	171,936	end of 3	
end of 4	54	175,007	0	1,831,911	0	982,956	2,995,154	0	159,181	0	16,670	175,851	end of 4	
end of 5	55	175,009	0	1,922,725	0	1,019,325	3,127,058	0	162,365	0	17,503	179,868	end of 5	
end of 6	56	175,010	0	2,033,227	0	1,057,040	3,265,277	0	165,612	0	18,378	183,991	end of 6	
end of 7	57	175,012	0	2,138,955	0	1,096,150	3,410,117	0	168,924	0	19,297	188,222	end of 7	
end of 8	58	175,014	0	2,250,180	0	1,136,708	3,561,902	0	172,303	0	20,262	192,565	end of 8	
end of 9	59	175,016	0	2,367,190	0	1,178,766	3,720,972	0	175,749	0	21,275	197,024	end of 9	
end of 10	60	175,018	0	2,490,284	0	1,222,380	3,887,682	0	179,264	0	22,339	201,603	end of 10	
end of 11	61	175,019	0	2,619,779	0	1,267,608	4,062,406	0	182,849	0	23,456	206,305	end of 11	
end of 12	62	175,021	0	2,756,008	0	1,314,509	4,245,538	0	186,506	0	24,629	211,135	end of 12	
end of 13	63	175,023	0	2,899,320	0	1,363,146	4,437,489	0	190,236	0	25,860	216,097	end of 13	
end of 14	64	175,024	0	3,050,085	0	1,413,582	4,638,692	0	194,041	0	27,153	221,194	end of 14	
end of 15	65	175,026	0	3,208,690	0	1,465,885	4,849,601	0	0	37,334	28,511	65,845	end of 15	
end of 16	66	175,028	0	3,375,542	0	1,520,123	5,070,692	0	0	38,267	29,937	68,204	end of 16	
end of 17	67	175,030	0	3,551,070	0	1,576,367	5,302,466	0	0	39,224	31,433	70,657	end of 17	
end of 18	68	175,032	0	3,735,726	0	1,634,693	5,545,450	0	0	40,205	33,005	73,210	end of 18	
end of 19	69	175,033	0	3,929,984	0	1,695,176	5,800,193	0	0	41,210	34,655	75,865	end of 19	
end of 20	70	175,035	0	4,134,343	0	1,757,898	6,067,276	0	0	42,240	0	42,240	end of 20	
										2,396,090	238,480	439,761	3,074,332	

Orange backgrounds indicate hypothetical returns

Step 9: Incomes Diagonal Carrots Arrows: In the Incomes table cell, click on the diagonal carrot arrow located in the upper right-hand corner of the cell.

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: Condense All and Uncondense All Function

Planning Horizon: 20 years

Year	Accounts		Accounts Total	Planned Distribution	Incomes			Total Income	Year	
	Account	Income			Wages	SS	VRBO			
net return	50	Grouped	2,525,000							
initial amount		Grouped	2,525,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.50 %	Infl Factor 5.00 %			
bonus %		Grouped	2,525,000							
w/bonus		2,525,000	2,525,000							
end of 1	51	2,634,452	2,634,452	0	150,000	0	14,400	164,400	end of 1	
end of 2	52	2,749,123	2,749,123	0	153,000	0	15,120	168,120	end of 2	
end of 3	53	2,869,268	2,869,268	0	156,060	0	15,876	171,936	end of 3	
end of 4	54	2,995,154	2,995,154	0	159,181	0	16,670	175,851	end of 4	
end of 5	55	3,127,058	3,127,058	0	162,365	0	17,503	179,868	end of 5	
end of 6	56	3,265,277	3,265,277	0	165,612	0	18,378	183,991	end of 6	
end of 7	57	3,410,117	3,410,117	0	168,924	0	19,297	188,222	end of 7	
end of 8	58	3,561,902	3,561,902	0	172,303	0	20,262	192,565	end of 8	
end of 9	59	3,720,972	3,720,972	0	175,749	0	21,275	197,024	end of 9	
end of 10	60	3,887,682	3,887,682	0	179,264	0	22,339	201,603	end of 10	
end of 11	61	4,062,406	4,062,406	0	182,849	0	23,456	206,305	end of 11	
end of 12	62	4,245,538	4,245,538	0	186,506	0	24,629	211,135	end of 12	
end of 13	63	4,437,489	4,437,489	0	190,236	0	25,860	216,097	end of 13	
end of 14	64	4,638,692	4,638,692	0	194,041	0	27,153	221,194	end of 14	
end of 15	65	4,849,601	4,849,601	0	0	37,334	28,511	65,845	end of 15	
end of 16	66	5,070,692	5,070,692	0	0	38,267	29,937	68,204	end of 16	
end of 17	67	5,302,467	5,302,467	0	0	39,224	31,433	70,657	end of 17	
end of 18	68	5,545,450	5,545,450	0	0	40,205	33,005	73,210	end of 18	
end of 19	69	5,800,193	5,800,193	0	0	41,210	34,655	75,865	end of 19	
end of 20	70	6,067,276	6,067,276	0	0	42,240	0	42,240	end of 20	
						2,396,090	238,480	439,761	3,074,332	

Orange backgrounds indicate hypothetical returns

Step 10: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, a breadcrumb trail reads: 'CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS'. On the right side, there are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main heading is 'Structured Income Planning'. Below the heading is 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 'Save' button. Below the buttons is a 'Scenario' dropdown menu set to 'Condense All and Uncondense All Function'. Underneath is a 'Planning Horizon' section with a '20 years' dropdown and two radio buttons: 'Accounts' (selected) and 'Incomes'. The main data table has columns: 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Grouped', 'Total Income', and 'Year'. The table contains 20 rows of data, with the first row for 'net return initial amount' and the last row for 'end of 20'. Orange backgrounds are used for the 'net return initial amount' and 'end of 20' rows. A legend at the bottom states: 'Orange backgrounds indicate hypothetical returns'.

Year	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return initial amount	50	2,525,000	2,525,000	0			
bonus % w/bonus		2,525,000	2,525,000	0			
end of 1	51	2,634,452	2,634,452	0	164,400	164,400	end of 1
end of 2	52	2,749,123	2,749,123	0	168,120	168,120	end of 2
end of 3	53	2,869,268	2,869,268	0	171,936	171,936	end of 3
end of 4	54	2,995,154	2,995,154	0	175,851	175,851	end of 4
end of 5	55	3,127,058	3,127,058	0	179,868	179,868	end of 5
end of 6	56	3,265,277	3,265,277	0	183,991	183,991	end of 6
end of 7	57	3,410,117	3,410,117	0	188,222	188,222	end of 7
end of 8	58	3,561,902	3,561,902	0	192,565	192,565	end of 8
end of 9	59	3,720,972	3,720,972	0	197,024	197,024	end of 9
end of 10	60	3,887,682	3,887,682	0	201,603	201,603	end of 10
end of 11	61	4,062,406	4,062,406	0	206,305	206,305	end of 11
end of 12	62	4,245,538	4,245,538	0	211,135	211,135	end of 12
end of 13	63	4,437,489	4,437,489	0	216,097	216,097	end of 13
end of 14	64	4,638,692	4,638,692	0	221,194	221,194	end of 14
end of 15	65	4,849,601	4,849,601	0	65,845	65,845	end of 15
end of 16	66	5,070,692	5,070,692	0	68,204	68,204	end of 16
end of 17	67	5,302,467	5,302,466	0	70,657	70,657	end of 17
end of 18	68	5,545,450	5,545,450	0	73,210	73,210	end of 18
end of 19	69	5,800,193	5,800,193	0	75,865	75,865	end of 19
end of 20	70	6,067,275	6,067,276	0	42,240	42,240	end of 20
		0	0	0	3,074,332	3,074,332	

Step 11: 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.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, a breadcrumb trail reads: 'CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS'. On the right side, there are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main heading is 'Structured Income Planning'. Below the heading is a row of buttons: 'Edit', 'Dynamic Mode', 'Cancel', 'Add Account', 'Add Income', 'Add Inc Tax', 'Add Target', 'Edit or Add Scenario', and 'Display Options'. A red arrow points to the 'Edit' button. Below the buttons is a 'Scenario' dropdown menu set to 'Condense All and Uncondense All Function'. Underneath is a 'Planning Horizon' section with a '20 years' dropdown and two radio buttons: 'Accounts' (selected) and 'Incomes'. The main data table has columns: 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Grouped', 'Total Income', and 'Year'. The table contains 20 rows of data, with the first row for 'net return initial amount' and the last row for 'end of 20'. Orange backgrounds are used for the 'net return initial amount' and 'end of 20' rows. A legend at the bottom states: 'Orange backgrounds indicate hypothetical returns'.

Year	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return initial amount	50	2,525,000	2,525,000	0			
bonus % w/bonus		2,525,000	2,525,000	0			
end of 1	51	2,634,452	2,634,452	0	164,400	164,400	end of 1
end of 2	52	2,749,123	2,749,123	0	168,120	168,120	end of 2
end of 3	53	2,869,268	2,869,268	0	171,936	171,936	end of 3
end of 4	54	2,995,154	2,995,154	0	175,851	175,851	end of 4
end of 5	55	3,127,058	3,127,058	0	179,868	179,868	end of 5
end of 6	56	3,265,277	3,265,277	0	183,991	183,991	end of 6
end of 7	57	3,410,117	3,410,117	0	188,222	188,222	end of 7
end of 8	58	3,561,902	3,561,902	0	192,565	192,565	end of 8
end of 9	59	3,720,972	3,720,972	0	197,024	197,024	end of 9
end of 10	60	3,887,682	3,887,682	0	201,603	201,603	end of 10
end of 11	61	4,062,406	4,062,406	0	206,305	206,305	end of 11
end of 12	62	4,245,538	4,245,538	0	211,135	211,135	end of 12
end of 13	63	4,437,489	4,437,489	0	216,097	216,097	end of 13
end of 14	64	4,638,692	4,638,692	0	221,194	221,194	end of 14
end of 15	65	4,849,601	4,849,601	0	65,845	65,845	end of 15
end of 16	66	5,070,692	5,070,692	0	68,204	68,204	end of 16
end of 17	67	5,302,467	5,302,466	0	70,657	70,657	end of 17
end of 18	68	5,545,450	5,545,450	0	73,210	73,210	end of 18
end of 19	69	5,800,193	5,800,193	0	75,865	75,865	end of 19
end of 20	70	6,067,275	6,067,276	0	42,240	42,240	end of 20
		0	0	0	3,074,332	3,074,332	

Step 12: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

Structured Income Planning

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

Scenario: Condense All and Uncondense All Function

Planning Horizon: 20 years

Year	Accounts		Planned Distribution	Incomes		Year
	Account	Income		Accounts Total	Grouped	
net return	50					
initial amount		2,525,000	2,525,000			
bonus % w/bonus		2,525,000	0			
end of 1	51	2,634,452	2,634,452	0	164,400	164,400
end of 2	52	2,749,123	2,749,123	0	168,120	168,120
end of 3	53	2,869,268	2,869,268	0	171,936	171,936
end of 4	54	2,995,154	2,995,154	0	175,851	175,851
end of 5	55	3,127,058	3,127,058	0	179,868	179,868
end of 6	56	3,265,277	3,265,277	0	183,991	183,991
end of 7	57	3,410,117	3,410,117	0	188,222	188,222
end of 8	58	3,561,902	3,561,902	0	192,565	192,565
end of 9	59	3,720,972	3,720,972	0	197,024	197,024
end of 10	60	3,887,682	3,887,682	0	201,603	201,603
end of 11	61	4,062,406	4,062,406	0	206,305	206,305
end of 12	62	4,245,538	4,245,538	0	211,135	211,135
end of 13	63	4,437,489	4,437,489	0	216,097	216,097
end of 14	64	4,638,692	4,638,692	0	221,194	221,194
end of 15	65	4,849,601	4,849,601	0	65,845	65,845
end of 16	66	5,070,692	5,070,692	0	68,204	68,204
end of 17	67	5,302,467	5,302,466	0	70,657	70,657
end of 18	68	5,545,450	5,545,450	0	73,210	73,210
end of 19	69	5,800,193	5,800,193	0	75,865	75,865
end of 20	70	6,067,275	6,067,276	0	42,240	42,240
			0	0	3,074,332	3,074,332

Orange backgrounds indicate hypothetical returns

Step 13: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | **SIGN OUT**

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

Structured Income Planning

Edit Dynamic Mode

Scenario: Condense All and Uncondense All Function

Planning Horizon: 20 years

Year	Accounts		Planned Distribution	Incomes		Year
	Account	Income		Accounts Total	Grouped	
net return	50					
initial amount		2,525,000	2,525,000			
bonus % w/bonus		2,525,000	0			
end of 1	51	2,634,452	2,634,452	0	164,400	164,400
end of 2	52	2,749,123	2,749,123	0	168,120	168,120
end of 3	53	2,869,268	2,869,268	0	171,936	171,936
end of 4	54	2,995,154	2,995,154	0	175,851	175,851
end of 5	55	3,127,058	3,127,058	0	179,868	179,868
end of 6	56	3,265,277	3,265,277	0	183,991	183,991
end of 7	57	3,410,117	3,410,117	0	188,222	188,222
end of 8	58	3,561,902	3,561,902	0	192,565	192,565
end of 9	59	3,720,972	3,720,972	0	197,024	197,024
end of 10	60	3,887,682	3,887,682	0	201,603	201,603
end of 11	61	4,062,406	4,062,406	0	206,305	206,305
end of 12	62	4,245,538	4,245,538	0	211,135	211,135
end of 13	63	4,437,489	4,437,489	0	216,097	216,097
end of 14	64	4,638,692	4,638,692	0	221,194	221,194
end of 15	65	4,849,601	4,849,601	0	65,845	65,845
end of 16	66	5,070,692	5,070,692	0	68,204	68,204
end of 17	67	5,302,467	5,302,466	0	70,657	70,657
end of 18	68	5,545,450	5,545,450	0	73,210	73,210
end of 19	69	5,800,193	5,800,193	0	75,865	75,865
end of 20	70	6,067,275	6,067,276	0	42,240	42,240
			0	0	3,074,332	3,074,332

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@planscout.com.
