

Condense All and Uncondense All Function

11/27/2024 2:20 pm 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 links: CLIENT DASHBOARD, STRUCTURED INCOME PLANNING, CASH FLOW AND TAX ADVISOR, ASSET ALLOCATION AND NET WORTH, GRAPHS, REPORTS, TOOLS. On the right, there are links for YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below these, it says 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main heading is 'Structured Income Planning' with a green 'Edit' button and a 'Dynamic Mode' indicator. A dropdown menu shows the scenario 'Condense All and Uncondense All Function'. Below this is a table with columns for 'Accounts' (Checkings/Savings Account, Individual Roth IRA, 401(k)) and 'Incomes' (Wages, SS, VRBO, Total Income). The table lists data from 'Year' 50 to 70, including 'net return', 'initial amount', 'bonus % w/bonus', and 'end of' values for each year. Orange backgrounds highlight certain cells, indicating hypothetical returns. A note at the bottom states: 'Orange backgrounds indicate hypothetical returns'.

Year	Accounts						Incomes				Total Income	Year		
	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS			VRBO	
net return	50	0.00 %		5.20 %		3.70 %	IRA	2,525,000						
initial amount		175,000		1,500,000		850,000		0						
bonus % w/bonus		175,000		1,500,000		850,000		0						
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	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	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	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	0	38,267	29,937	68,204	end of 16
end of 17	67	175,030	0	3,551,070	0	1,576,367	0	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	0	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	0	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	0	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	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	0	38,267	29,937	68,204	end of 16
end of 17	67	175,030	0	3,551,070	0	1,576,367	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	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	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	0	0	42,240	0	42,240	end of 20
		0	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		Color
Group 1	Accounts	<input type="text" value="Se"/>
Group 2		<input type="text" value="Se"/>
Group 3		<input type="text" value="Se"/>
Group 4		<input type="text" value="Se"/>
Group 5		<input type="text" value="Se"/>

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

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:
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	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	50						
initial amount	2,525,000		2,525,000	0			
bonus % w/bonus	2,525,000		2,525,000	Subtotal of account incomes			
end of 1	51 2,634,452	0	2,634,452	0	164,400	164,400	end of 1
end of 2	52 2,749,123	0	2,749,123	0	168,120	168,120	end of 2
end of 3	53 2,869,268	0	2,869,268	0	171,936	171,936	end of 3
end of 4	54 2,995,154	0	2,995,154	0	175,851	175,851	end of 4
end of 5	55 3,127,058	0	3,127,058	0	179,868	179,868	end of 5
end of 6	56 3,265,277	0	3,265,277	0	183,991	183,991	end of 6
end of 7	57 3,410,117	0	3,410,117	0	188,222	188,222	end of 7
end of 8	58 3,561,902	0	3,561,902	0	192,565	192,565	end of 8
end of 9	59 3,720,972	0	3,720,972	0	197,024	197,024	end of 9
end of 10	60 3,887,682	0	3,887,682	0	201,603	201,603	end of 10
end of 11	61 4,062,406	0	4,062,406	0	206,305	206,305	end of 11
end of 12	62 4,245,538	0	4,245,538	0	211,135	211,135	end of 12
end of 13	63 4,437,489	0	4,437,489	0	216,097	216,097	end of 13
end of 14	64 4,638,692	0	4,638,692	0	221,194	221,194	end of 14
end of 15	65 4,849,601	0	4,849,601	0	65,845	65,845	end of 15
end of 16	66 5,070,692	0	5,070,692	0	68,204	68,204	end of 16
end of 17	67 5,302,467	0	5,302,466	0	70,657	70,657	end of 17
end of 18	68 5,545,450	0	5,545,450	0	73,210	73,210	end of 18
end of 19	69 5,800,193	0	5,800,193	0	75,865	75,865	end of 19
end of 20	70 6,067,275	0	6,067,276	0	42,240	42,240	end of 20
					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:
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	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	50						
initial amount	2,525,000		2,525,000	0			
bonus % w/bonus	2,525,000		2,525,000	Subtotal of account incomes			
end of 1	51 2,634,452	0	2,634,452	0	164,400	164,400	end of 1
end of 2	52 2,749,123	0	2,749,123	0	168,120	168,120	end of 2
end of 3	53 2,869,268	0	2,869,268	0	171,936	171,936	end of 3
end of 4	54 2,995,154	0	2,995,154	0	175,851	175,851	end of 4
end of 5	55 3,127,058	0	3,127,058	0	179,868	179,868	end of 5
end of 6	56 3,265,277	0	3,265,277	0	183,991	183,991	end of 6
end of 7	57 3,410,117	0	3,410,117	0	188,222	188,222	end of 7
end of 8	58 3,561,902	0	3,561,902	0	192,565	192,565	end of 8
end of 9	59 3,720,972	0	3,720,972	0	197,024	197,024	end of 9
end of 10	60 3,887,682	0	3,887,682	0	201,603	201,603	end of 10
end of 11	61 4,062,406	0	4,062,406	0	206,305	206,305	end of 11
end of 12	62 4,245,538	0	4,245,538	0	211,135	211,135	end of 12
end of 13	63 4,437,489	0	4,437,489	0	216,097	216,097	end of 13
end of 14	64 4,638,692	0	4,638,692	0	221,194	221,194	end of 14
end of 15	65 4,849,601	0	4,849,601	0	65,845	65,845	end of 15
end of 16	66 5,070,692	0	5,070,692	0	68,204	68,204	end of 16
end of 17	67 5,302,467	0	5,302,466	0	70,657	70,657	end of 17
end of 18	68 5,545,450	0	5,545,450	0	73,210	73,210	end of 18
end of 19	69 5,800,193	0	5,800,193	0	75,865	75,865	end of 19
end of 20	70 6,067,275	0	6,067,276	0	42,240	42,240	end of 20
					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		Manage Infl Factor	Manage Infl Factor	Manage Infl Factor			
net return	50	0.00 %		5.20 %		3.70 %		2,525,000						
initial amount		175,000		1,500,000		850,000		2,525,000						
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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 16	66	175,028	0	3,375,542	0	1,520,123	0	5,070,692	0	0	38,267	29,937	68,204	
end of 17	67	175,030	0	3,551,070	0	1,576,367	0	5,302,466	0	0	39,224	31,433	70,657	
end of 18	68	175,032	0	3,735,726	0	1,634,693	0	5,545,450	0	0	40,205	33,005	73,210	
end of 19	69	175,033	0	3,929,984	0	1,695,176	0	5,800,193	0	0	41,210	34,655	75,865	
end of 20	70	175,035	0	4,134,343	0	1,757,898	0	6,067,276	0	0	42,240	0	42,240	
										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	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	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	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	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	0	38,267	29,937	68,204	end of 16
end of 17	67	175,030	0	3,551,070	0	1,576,367	0	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	0	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	0	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	0	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	Infl Factor	Infl Factor				
bonus %		Grouped	2,525,000		2.00 %	2.50 %	5.00 %				
w/bonus			2,525,000								
end of 1	51	2,634,452	0	2,634,452	0	150,000	0	14,400	164,400	end of 1	
end of 2	52	2,749,123	0	2,749,123	0	153,000	0	15,120	168,120	end of 2	
end of 3	53	2,869,268	0	2,869,268	0	156,060	0	15,876	171,936	end of 3	
end of 4	54	2,995,154	0	2,995,154	0	159,181	0	16,670	175,851	end of 4	
end of 5	55	3,127,058	0	3,127,058	0	162,365	0	17,503	179,868	end of 5	
end of 6	56	3,265,277	0	3,265,277	0	165,612	0	18,378	183,991	end of 6	
end of 7	57	3,410,117	0	3,410,117	0	168,924	0	19,297	188,222	end of 7	
end of 8	58	3,561,902	0	3,561,902	0	172,303	0	20,262	192,565	end of 8	
end of 9	59	3,720,972	0	3,720,972	0	175,749	0	21,275	197,024	end of 9	
end of 10	60	3,887,682	0	3,887,682	0	179,264	0	22,339	201,603	end of 10	
end of 11	61	4,062,406	0	4,062,406	0	182,849	0	23,456	206,305	end of 11	
end of 12	62	4,245,538	0	4,245,538	0	186,506	0	24,629	211,135	end of 12	
end of 13	63	4,437,489	0	4,437,489	0	190,236	0	25,860	216,097	end of 13	
end of 14	64	4,638,692	0	4,638,692	0	194,041	0	27,153	221,194	end of 14	
end of 15	65	4,849,601	0	4,849,601	0	0	37,334	28,511	65,845	end of 15	
end of 16	66	5,070,692	0	5,070,692	0	0	38,267	29,937	68,204	end of 16	
end of 17	67	5,302,467	0	5,302,467	0	0	39,224	31,433	70,657	end of 17	
end of 18	68	5,545,450	0	5,545,450	0	0	40,205	33,005	73,210	end of 18	
end of 19	69	5,800,193	0	5,800,193	0	0	41,210	34,655	75,865	end of 19	
end of 20	70	6,067,276	0	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 toolbar with 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 toolbar 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 is a 20-year projection with columns: Year, Account, Income, Accounts Total, Planned Distribution, Grouped, Total Income, and Year. The table shows a net return of 50% and a total income of 3,074,332 at the end of 20 years. Orange backgrounds indicate hypothetical returns.

Year	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	50						
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	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 toolbar with 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 toolbar 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 is a 20-year projection with columns: Year, Account, Income, Accounts Total, Planned Distribution, Grouped, Total Income, and Year. The table shows a net return of 50% and a total income of 3,074,332 at the end of 20 years. Orange backgrounds indicate hypothetical returns.

Year	Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	50						
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	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.

The screenshot shows the 'Structured Income Planning' interface. At the top right, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. A secondary navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The main heading is 'Structured Income Planning', with a row of buttons: 'Edit', 'Save', 'Cancel', 'Add Account', 'Add Income', 'Add Inc Tax', 'Add Target', 'Edit or Add Scenario', and 'Display Options'. The 'Cancel' button is highlighted with a red arrow. Below the buttons is a 'Scenario' dropdown menu set to 'Condense All and Uncondense All Function'. The 'Planning Horizon' is set to '20 years'. A table displays financial data for 20 years, with columns for Year, Account, Income, Accounts Total, Planned Distribution, Grouped, Total Income, and Year. The table includes rows for 'net return initial amount', 'bonus % w/bonus', and annual data from 'end of 1' to 'end of 20'. A footer note states: '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.

This screenshot is identical to the one above, showing the 'Structured Income Planning' interface. The 'Cancel' button is no longer highlighted. Instead, a red arrow points to the 'SIGN OUT' button in the top right corner of the page, which is part of the navigation bar.

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.
