Understanding a Structured Income Plan that has a Target Income and an After Tax Target Columns

12/20/2024 4:12 pm EST

Below is an explanation of what each column represents when a structured income plan has a target income, income tax, and planned distributions columns within the plan.

Step 1: Initial Plan Date: This date represents the first day of the structured income plan.

														YOUR CA	ASE LIST	SETTINGS	HELP SIGN (
Doe Ja	ane															PREPARED	BY: DEMO ADVIS
200,0	anc															NITIAL PLAN DA	TE: 01/01/2025
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS F	EPORTS 1	OOLS			RE	VISED PLAN DA	TE: 12/16/2024
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		Taxa	able	Tax-De	ferred	Tax-F	ree										
Planning Horizon	16 years ∨	Brokerage	Investments		RA	R	отн			Inco	mes 📈	Expenses					
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Cubtotal							from total	
honus %		0.00 %		0.00 %	lane inc	40,000		1,540,000	of account	Infl Factor	Infl Factor	Infl Factor			Infl Factor	income to	
w/bonus		500,000		1,000,000	ouno mo	40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %			3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	(20,000)	0	109,273	109,273	0	2028
2029	67	274 521	112.015	1,270,202	0	70,009	0	1,023,330	112 015	0	33,113	(30,000)	0	112,007	112,001	0	2029
2031	68	273 000	116 501	1,407,100	0	88 280	0	1 768 380	116 501	0	34 116	(31,212)	0	119 405	119 405	0	2031
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0	122,987	122,987	0	2032
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0	126,677	126,677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)	142,576	142,576	0	2037
2030	75	0	0	1,301,038	139,659	140 704	0	1,494,598	139,659	0	38,432	0	(26,832)	140,053	140,053		2030
2040	77	0	0	1,210,146	144.660	149,147	0	1.359.292	144.660	0	39.008	0	(27.872)	155,797	155,797	0	2040
		•	663,905	.,	851,878		(21,000)	10001272	1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds ind	licate hypothe	etical returns														

Step 2: Scenario: This text box shows the scenario you are currently viewing. To switch scenarios, click the dropdown arrow and select a different one.

Doe, Jane	1001.04		111100 1 11	
Doe, Jane				
			PREPARED BY	DEMO ADVISOR
AUSTIC DAGUNG DE ATTUCTUNG DU AUNUNG CARUELOW AND TAX ADVICOD ACCETAL CONTINUAND NET WORTH CONDUC DEDOTECT TOOLO		INI	TIAL PLAN DATE	: 01/01/2025
CLENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX AUVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS		REVI	SED PLAN DATE	: 12/11/2024
Structured Income Planning				
Etit Dunamic Mode				
Scenario Starting Plan Demo				
Tavable Tav. Deferred Tav. Free Tav.				
Planning 16 years V Brokerage Investments IRA ROTH Incomes X Expenses				
Year Jane Account Income Account Income Account Income Account Income Account Income Account Total Distribution Wages Jane SS Travel Incom	e Tax After Tax Income	After Tax Target	Income Gap	Year
net return 61 4.00 % 5.00 % Jane IRA 6.00 %		income		
initial amount 500,000 1,000,000 40,000 1,540,000 Subtotal 16f Sector Inf Sec	Pate	Infl Eactor	from total	
w/bonus 500,000 1,000,000 1,000,000 1,540,000	k Nate	3.00 %	target	
2025 62 53,633 (15,633) 1,050,000 0 49,400 (0,000) 1,635,033 (22,633) 150,000 0 (27,367))-17% 100,000	100,000	0	2025
2026 b3 571,569 (14,531) 1,102,500 0 59,364 (1000) 1,735,553 (21,531) 153,000 0 0 (28,355 2027 64 608,207 (13,450) 1157,255 0 6,69,267 (2000) 1,855,758 (20,650) 156,060 0 0 (28,355	0-17% 103,000	103,000	0	2026
2028 65 55588 76.647 1.215.506 0 74.121 0 1.845.516 76.647 0 32.626 0	0-0% 109.273	109,273	0	2028
2029 66 468,688 109,436 1,276,282 0 78,569 0 1,823,538 109,436 0 33,115 (30,000)	0-0% 112,551	112,551	0	2029
2030 67 374,521 112,915 1,340,096 0 83,283 0 1,797,899 112,915 0 33,612 (30,600)	0-0% 115,927	115,927	0	2030
2031 68 273,000 116,501 1,407,100 0 88,280 0 1,768,380 116,501 0 34,116 (31,212)	0-0% 119,405	119,405	0	2031
2032 69 163,725 120,196 1,477,455 0 93,577 0 1,734,757 120,196 0 34,628 (31,836)	0-0% 122,987	122,987	0	2032
2033 /0 46,2/1 124,003 1,551,328 0 99,191 0 1,696,790 124,003 0 35,147 (32,473)	0-0% 126,677	126,677	0	2033
2034 /1 0 40,122 1,373,034 33,040 105,143 0 1,078,190 103,903 0 33,073 0 (9,102) 2035 72 0 0 1520,519 131,90 111,451 0 154,190 131,90 0 25210 0 (9,102)	0-15% 130,477	130,477	0	2034
2036 73 0 0 1481458 125555 118188 0 15996 125555 0 36753 0 (2307)-15% 138.423	138,423	0	2036
2037 74 0 0 1,425,404 130,127 125,226 0 1,550,631 130,127 0 37,304 0 (24,855	0-15% 142.576	142.576	0	2037
2038 75 0 0 1,361,858 134,817 132,740 0 1,494,598 134,817 0 37,864 0 (25,827)-15% 146,853	146,853	0	2038
2039 76 0 0 1,290,292 139,659 140,704 0 1,430,996 139,659 0 38,432 0 (26,832)-15% 151,259	151,259	0	2039
2040 77 0 0 1,210,146 144,660 149,147 0 1,359,292 144,660 0 39,008 0 (27,872)-15% 155,797	155,797	0	2040
<u>663,905</u> 851,878 (21,000) 1,494,782 459,060 464,491 (156,121) (24)	6,524) 2,015,688	2,015,688	0	
Orange backgrounds indicate hypothetical returns				

Step 3: Planning Horizon: This text box displays the timeline for the planning scenario. To adjust the timeline, click the dropdown arrow and select a timeframe.

														YOUR CAS	E LIST SE	TTINGS H	ELP SIGN OUT
Doe. J	ane															PREPARED BY	DEMO ADVISOR
200,0	anc														INIT	TAL PLAN DATE	01/01/2025
CLIENT DASHBO	ARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH 0	GRAPHS F	EPORTS	TOOLS			REVI	SED PLAN DATE	: 12/11/2024
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Planning	16 years ∨										a ^k		1				
Horizon		Brokerage	Investments		RA	R	OTH			Inco	mes	Expenses					
Voor	lana	Account	Income	Account	Income	Account	Income	Accounts	Planned	Jane	Iano CC	Traval	Income Tax	After Tax	After Tax	Income	Voor
Teal	Jane	Account	income	Account	income	Account	income	Total	Distribution	Wages	Jane 33	Havei	income rax	Income	Income	Gap	real
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		4 5 40 000									
initial amount		500,000		1,000,000	lane inc	40,000		1,540,000	of account	Infl Eactor	Infl Eactor	Infl Factor	Eff Tay Pate		Infl Eactor	from total	
w/bonus		500.000		1.000.000	Julie Inc	40.000		1.540.000	incomes	2.00 %	1.50 %	2.00 %	En lax Nate		3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	2/3,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	70	103,725	120,196	1,477,455	0	93,577	0	1,/34,/5/	120,196	0	34,028	(31,830)	0-0%	122,987	122,987	0	2032
2033	70	40,2/1	48 122	1,551,528	55.840	105 1/2	0	1,090,790	103 962	0	35,147	(32,473)	(9160)-10%	120,077	120,077	0	2033
2035	72	0	+0,122	1 530 518	121 189	111 451	0	1 641 969	121 189	0	36,073	0	(23,007)-15%	134 392	134 392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1.599.596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
		_	663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orango ha	ckarounds in	dicate hypothe	etical returns														

Step 4: Calendar Year: The leftmost and rightmost columns represent the calendar years within the timeframe.

SIPS	0													YOUR CAS	E LIST SE	TTINGS H	IELP SIG	N OUT
Doe	lane															PREPARED B	Y: DEMO AD	VISOR
D00, (June														INIT	TAL PLAN DAT	E: 0101/202	25
CLIENT DASH	BOARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH 0	RAPHS F	REPORTS	TOOLS			REVI	SED PLAN DAT	E: 12 11/202	24
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Plannin Horizor	16 years ∨	Brokerage	e Investments		IRA	R	отн			Inco	mes 📈	Expenses					+	_
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		and the second s	(
initial amou	nt	500,000		1,000,000	1000	40,000		1,540,000	Subtotal		1.05.00					from total		
w/bonus		500.000		1.000.000	Jane Inc	40.000		1.540.000	incomes	2.00 %	1.50 %	2.00 %	EIT Tax Rate		3.00 %	target		
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	66	468 688	109.436	1,215,500	0	78,569	0	1,845,510	109.436		32,020	(30,000)	0-0%	112 551	112 551	0	2028	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	121 190	105,143	0	1,6/1,060	103,903	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	662.005	1,210,146	144,660	149,147	(21.000)	1,359,292	144,660	450.010	39,008	(156 101)	(27,872)-15%	155,797	155,797	0	2040	
Orango	backgrounds in	dicate hypoth	due, coo		851,878		(21,000)		1,494,782	459,060	404,491	(156,121)	(240,524)	2,015,688	2,015,688	0		
orange	backgrounus in	alcate hypoth	eucarreturns															_

Step 5: Final Row: The final row indicates the last year of the planning horizon.

														YOUR CASE	E LIST SET	TTINGS H	ELP SIG	NOUT
Doe la	ane															PREPARED BY	DEMO AD	VISOR
DUC, 0.	anc														INIT	IAL PLAN DATE	01/01/202	/5
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL/	OW AND TAX A	DVISOR A	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS	EPORTS T	OOLS			REVIS	ED PLAN DATE	12/11/202	.4
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		Taxa	ble	Tax-De	ferred	Tax-	ree		1									
Planning Horizon	16 years ∽	Brokerage	+ Investments		IRA	R	OTH			Incor	mes 📈	Expenses						
		 ,		 ,		_ ,							-		After Tax			1
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	Target	Gap	Year	
net return	61	4.00 %	$ \rightarrow $	5.00 %	Jane IRA	6.00 %	\vdash								Income			
initial amount		500,000	ć – J	1,000,000		40,000	(/	1,540,000	Subtotal		i			[]		from total		11
bonus %	()	0.00 %	()	0.00 %	Jane inc	0.00 %	(/	0	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to		1.1
w/bonus	(500,000	()	1,000,000		40,000	(/	1,540,000	incomes	2.00 %	1.50 %	2.00 %			3.00 %	target		11
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	11
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	1
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	(0)	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	(0)	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	(0)	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	1
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		· 1
Orange ba	ackgrounds in	dicate hypoth	etical returns															

Step 6: Name and Age: This column displays the client's name and age. The starting age represents the client's current age, while the final row reflects the client's age at the end of the planning horizon.

SIPS														YOUR CAS	E LIST SE	TTINGS HE	LP SIGN OUT
Doo I	200															PREPARED BY	DEMO ADVISOR
DUE, J	ane														INIT		01/01/2025
CLIENT DASHBO	ARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS T	OOLS			REVIS	SED PLAN DATE:	12/11/2024
Ctructu	urad l	noom		ning													
Silucii	uleu l	IICOIII	erial	mmy													
Edit Dynamic	c Mode																
Scenario Star	rting Pan Den	10					~										
oru	ing i bon																
		Taxa	able 📈	Tax-De	eferred 🔊 🖉	Tax-	Free 📈										
Planning	16 years Y										_¥						
Horizon	V	Brokerage	e Investments		IRA	R	OTH			Inco	mes	Expenses					
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %									S		
initial amount		500,000		1,000,000	lane inc	40,000		1,540,000	Subtotal	Infl Eactor	Infl Eactor	Infl Eactor	Eff Tay Pate		Infl Factor	income to	
w/bonus		500,000		1,000,000	oune me	40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %	En lax hate		3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	60	408,088	109,436	1,270,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0.0%	112,551	112,551	0	2029
2030	69	374,521	112,915	1,340,096		03,203	0	1,797,899	112,915	0	33,012	(30,000)	0-0%	110,927	110,927	0	2030
2032	69	163 725	120 196	1 477 455	0	93 577	0	1 734 757	120 196	0	34 628	(31,836)	0-0%	122 987	122 987	0	2032
2033	70	46 271	124,003	1,551,328	0	99 191	0	1 696 790	124,003	0	35.147	(32 473)	0-0%	126.677	126.677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	÷
Orange ba	ackgrounds in	dicate hypoth	etical returns														

Step 7: Accounts: These columns represent the client's monetary account information. They include the account title, the monetary balance, the yearly growth percentage, and the yearly income growth amount.

				1										YOUR CAS	E LIST SE	TTINGS H	ELP SIGN	OUT
Doe. J	ane															PREPARED BY	: DEMO ADVI	SOR
200,0	anc														INIT	TAL PLAN DATE	01/01/2025	5
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FI	W AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET	WORTH G	RAPHS	EPORTS	TOOLS			REVIS	SED PLAN DATE	: 12/11/2024	
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Stenano Star	rting Plan Den	10		-	-		~											
		Taxa	ble 🔊 🖉	Tax-De	eferred $ ightarrow^{k'}$	Tax-	Free 🛪 🤟											
Planning Horizon	Ing 16 years Income Account Income Income Income																	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %												
initial amount		500,000		1,000,000	lana ina	40,000		1,540,000	Subtotal	Infl Factor	Infl Factor	In Contac	Eff Tau Data		Infl Faster	from total		
w/honus		500.000		1 000 000	Jane Inc	40.000 %		1 540 000	incomes	2 00 %	1 50 %	2 00 %	EIT Tax Rate		3 00 %	target		
2025	62	535,633	(15.633)	1,050,000	0	49,400	(7.000)	1,635,033	(22.633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	69	163 725	120 196	1,407,100	0	00,200	0	1,700,300	120 196	0	34,110	(31,212)	0-0%	122 987	122 987	0	2037	
2033	70	46.271	124.003	1.551.328	Ő	99,191	0	1.696.790	124.003	0	35,147	(32,473)	0-0%	126.677	126.677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	17	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	(15(101)	(27,872)-15%	155,797	155,797	0	2040	
			003,905		851,878		(21,000)		1,494,782	459,060	404,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ackgrounds in	ficate hypoth	etical returns															

Step 8: Grayed out Accounts Section: The grayed-out section of the accounts represents the starting net amount, initial amount, bonus %, and the bonus amount.

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Doe, J	ane														INIT	PREPARED BY	DEMO ADVISOR
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	GRAPHS R	EPORTS T	OOLS			REVIS	SED PLAN DATE:	12/11/2024
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1.5.000																	
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Planning Horizon	16 years ∽	kerage	e Investments	ł	IRA	R	отн			Inco	mes 📈	Expenses					
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Subtotal							from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		1,540,000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
w/bonus		500,000		1,000,000		40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %			3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	64	608 207	(13,650)	1,102,500	0	69,304	(7,000)	1,733,553	(21,031)	155,000	0	0	(28,309)-17%	105,000	105,000	0	2020
2028	65	555,888	76,647	1,215,506	0	74,121	(7,000)	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	2/3,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	70	46 271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126 677	0	2032
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2039	76	0	0	1,301,050	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26.832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
· · · · · · · · · · · · · · · · · · ·	с т		663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	÷
Orange ba	ackgrounds inc	licate hypoth	etical returns														

Step 9: First Row of the Accounts Columns: The monetary amount in the first row represents the amounts of what the account will be at the end of the calendar year.

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															YOUR CAS	E LIST SE	TTINGS H	ELP SIGN (JUT
Doe. J	ane																PREPARED BY	: DEMO ADVIS	SOR
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CLIENT DASHDO	ARD STRU	JUTUREI	DINCO	ME PLANNING	I CAS	TPLOW AND TAX	ADVISOR	ASSET ALLOC	ATION AND NE	WORTH C	SKAPIIS I	LEPORTS	TOOLS			REVI	SED PLAN DATE	: 12/11/2024	
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Planning	16		_						-			×		1					
Horizon	to years v	Bro	erage	Investments		IRA		ROTH			Inco	mes 🔎	Expenses						
Mana	teres.			100000					Accounts	Planned	Jane	1000	Travel	Income Texa	After Tax	After Tax	Income	Maria	
Year	Jane	ACC	unt	Income	Acour	Income	Accou	nt Income	Total	Distribution	Wages	Jane SS	Travel	Income Tax	Income	Income	Gap	Year	
net return	61	4	00 %		5 00	% Jane IR/	6.0	%	1.540.000										
initial amount		50	0,000		1,000,0	% Jane in	40	8	1,540,000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tay Rate		Infl Factor	income to		
w/bonus		500	000		1,000,0	00	40	000	1,540,000	incomes	2.00 %	1.50 %	2.00 %	chi fux fiute		3.00 %	target		
2025	62	535	5,633	(15,633)	1,050,0	00	49,	400 (7,000) 1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	
2026	63	571	,689	(14,631)	1,102,5	00	59,	364 (7,000) 1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608	3,207	(13,650)	1,157,6	25	69,	926 (7,000) 1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555	5,888	76,647	1,215,5	06	74,	121	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468	3,688	109,436	1,276,2	82	78,	569	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374	1,521	112,915	1,340,0	96	83,	283	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	60	163	725	120 196	1,407,1	55	00,	577	1 724 757	120 106		34,110	(31,212)	0-0%	122.097	122.097		2031	
2032	70	46	5 271	124 003	1,551.3	28	90,	191	1,734,737	124,003		35 147	(32,473)	0-0%	126,507	126 677		2032	
2034	71		0	48,122	1.573.0	54 55.84	105	143	1.678.196	103,963	0	35.675	0	(9.160)-10%	130,477	130,477	Ő	2034	
2035	72		0	0	1,530,5	18 121,18	111	451	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	
2036	73		0	0	1,481,4	58 125,58	118	138	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74		0	0	1,425,4	04 130,12	125,	226	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75		0	0	1,361,8	58 134,81	132,	740	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76		0	0	1,290,2	92 139,65	140,	704	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77		0	0	1,210,1	46 144,66	149,	147	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
				663,905		851,87	3	(21,000)	1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ckgrounds inc	dicate h	ypothe	etical returns															

Step 10: First Row of the Account Income Column: The number in the row of the income represents if there was a deposit or withdrawal from the account. If the numeric value is in parenthesis, it represents a deposit. If the numeric

amount has no parenthesis around it represents a withdrawal.



Step 11: Final Row of the Accounts Income Column: The numbers on the income section side of the accounts represents the sums of the incomes. If the number value is in (parenthesis), it represents a deposit. If the numeric amount has no parenthesis around it represents a withdrawal.

																	YOUR CAS	E LIST SE	TTINGS H	ELP SIGN OUT
Doe .l	ane																		PREPARED B	: DEMO ADVISOR
200,0	anc																	INIT	IAL PLAN DAT	E: 01/01/2025
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PL	ANNING	CASH FLO	OW AN	D TAX AL	VISOR A	SSET	ALLOCA	TION AND NET	WORTH G	RAPHS	EPORTS 1	OOLS			REVIS	SED PLAN DAT	E: 12/11/2024
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		Taxa	able	×	Tax-De	ferred	×	Tax-	Free	×										
Planning	16 years ∽	Brokerage	Invest	ments		RA		P	отн				Inco	mes 7 ^K	Evnenses					
Horizon		Diokeruge		incinto									inco	inco	LAPENDED					
Year	Jane	Account	Inc	ome	Account	Inc	ome	Account	Inc	ome	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year
net return	61	4.00 %			5.00 %	Ja	e IRA	6.00 %					-				-			
initial amount		500,000			1,000,000			40,000			1,540,000	Subtotal	Infl Faster	Infl Contor	Infl Feator	Eff Tax Data		Infl Footor	from total	
w/bonus		500,000			1.000.000	Je	ie inc	40.000			1,540,000	incomes	2.00 %	1.50 %	2.00 %	LIT Tax Nate		3.00 %	target	
2025	62	535,633	(1	,633)	1,050,000		0	49,400	(,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(1	,631)	1,102,500		0	59,364	9	,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(1	,650)	1,157,625		0	69,926	9	,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	66	555,888	1	0,047	1,215,506			74,121		0	1,845,516	100.426	0	32,626	(30,000)	0-0%	109,273	109,273	0	2028
2029	67	374 521	1	2 915	1,270,202	-	0	83,283	-	0	1,023,330	112 915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2029
2031	68	273,000	1	5,501	1,407,100		Ő	88,280		0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,725	1:	D,196	1,477,455		0	93,577		0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	46,271	1:	4,003	1,551,328		0	99,191		0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033
2034	71	0	-	B,122	1,573,054		5,840	105,143		0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0		0	1,530,518	1	1,189	111,451		0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0		0	1,481,458	1	0,085	125 226		0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0		0	1 361 858	1	4.817	125,226		0	1,000,031	134,817	0	37,304	0	(25.827)-15%	142,576	142,576	0	2037
2039	76	0		Lo	1,290,292	1	9.659	140,704		Lo	1,430,996	139,659	0	38,432	0	(26.832)-15%	151,259	151,259	0	2039
2040	77	0		0	1,210,146	1.	4.660	149,147		0	1,359,292	144.660	0	39,008	0	(27.872)-15%	155,797	155,797	0	2040
		-	66	53,905	,	85	51,878		(2	1,000)	,,=-=	1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	1
Orange ba	ckgrounds ind	licate hypoth	etical	returns																4

Step 12: Accounts Total: This column represents the combined monetary total of all accounts.

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Doe, Ja	ane															PREPARED BY	DEMO ADVISOR
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AL D NET	WORTH G	RAPHS R	EPORTS T	TOOLS			REVIS	SED PLAN DATE	: 01/01/2025 : 12/11/2024
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Planning Horizon	16 years ∽	Brokerage	Investments		IRA	R	отн	÷.		Inco	mes 📈	Expenses					
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Subtotal							from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		1,540,000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
w/bonus		500,000		1,000,000		40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %			3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	22.626	0	(29,320)-17%	106,090	106,090	0	2027
2028	66	468.688	109.436	1,276,282	0	78,569	0	1,843,510	109.436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2028
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,401,400	120,000	125 226	0	1,599,590	125,565	0	37 304	0	(23,915)-15%	142 576	142 576	0	2036
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds inc	dicate hypothe	etical returns														

Step 13: Planned Distribution: This value represents the total funds added or withdrawn from the accounts in that year of the plan. Numbers in (parenthesis) indicate overall savings to accounts in that year, numbers not in parenthesis indicate a withdrawal from accounts in that year.

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Doe, Ja	ane															PREPARED BY	C DEMO ADVI	SOR
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX AI	VISOR A	SSET ALLOCA	TION AND NET	WORTH	GRAPHS R	EPORTS	TOOLS			REVI	SED PLAN DATE	E: 12/11/2024	
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Planning Horizon	16 years ∽	Brokerage	Investments		IRA	R	отн		+	Inco	mes 📈	Expenses						
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Subtotal	-	2					from total		
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		1,540,000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to		
w/bonus		500,000		1,000,000		40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %			3.00 %	target		
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	
2026	64	5/1,689	(14,631)	1,102,500	0	59,364	(7,000)	1,/33,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	65	555,888	76 647	1,137,023	0	74 121	(7,000)	1,845,516	76 647	130,000	32 626	0	0-0%	109,050	109,050	0	2027	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	72	0	48,122	1,573,054	121 120	111.451	0	1,6/1,060	103,903	0	35,075	0	(9,100)-10%	130,477	130,477	0	2034	
2035	73	0	0	1 481 458	125,585	118 138	0	1 599 596	125,585	0	36,210	0	(23,007)-15%	138,423	138,423	0	2035	
2037	74	0	0	1,425,404	130,127	125.226	0	1.550.631	130,127	0	37,304	0	(24.855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ckgrounds ind	licate hypothe	etical returns															

Step 14: Final Row of the Planned Distriburtion Column: This number represents the sum of all the yearly planned distributions. If the number value is in (parenthesis), it represents a deposit. If the numeric amount has no parenthesis around it represents a withdrawal.

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Doe, J	ane															PREPARED BY	: DEMO ADV	SOR
CLIENT DASHBO	DARD STRU	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR /	ASSET ALLOCA	TION AND NET	WORTH /	GRAPHS R	EPORTS T	TOOLS			INIT	TAL PLAN DATE	: 01/01/2025	
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Planning	16 years	<u> </u>				-		1			×		1					
Horizon	To years	Brokerage	Investments		RA	R	OTH			Inco	mes	Expenses ⁷⁷						
							[/	Accounts	Planned	lane				After Tay	After Tax	Income		
Year	Jane	Account	Income	Account	Income	Account	Income	Total	Distribution	Wages	Jane SS	Travel	Income Tax	Income	Target Income	Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %	(/											
initial amount		500,000		1,000,000		40,000	(1,540,000	Suitotal							from total		
bonus %		0.00 %		0.00 %	Jane inc	0.00 %	(/	1 5 10 000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to		
W/Donus 2025	62	535 633	(15.633)	1,000,000	0	40,000	(7,000)	1,540,000	(21,633)	150,000	1.50 %	2.00 %	(27 367)-17%	100.000	3.00 %	target	2025	
2026	63	571.689	(14,631)	1,102,500	í ől	59.364	(7,000)	1,733,553	(2 631)	153.000	0	0	(28.369)-17%	103,000	103,000	0	2026	_ J
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7.000)	1,835,758	(2(650)	156,060	0	0	(29.320)-17%	106.090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	75,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	10,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	115,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	1
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	1
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	121,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	10,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0'	1,641,969	12,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	13,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	121659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	U		
Orange ba	ackgrounds inc	dicate hypoth/	etical returns															1

Step 15: Client's Wages: This column is part of the income section and represents the client's yearly wage. The grayed-out section displays the inflation factor percentage for the yearly wage increase. The starting wage amount corresponds to the value entered on the income page. Similarly, the inflation factor percentage aligns with the percentage specified on the income page.

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Doe, J	ane															PREPARED BY	DEMO ADV	ISOR
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CLIENT DASHBO	ARD STRU	CTURED INCOM	ME PLANNING	CASH FL	OW AND TAX AF	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPH: F	REPORTS	TOOLS			REVIS	SED PLAN DATE	: 12/11/2024	4
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	ing 16 years ✓ Brokerage Investments IRA ROTH ✓ Incomes ★ Expenses ★ Expenses																	
Planning	Income Income Income Income Income Income																	
Horizon	ning 16 years Brokerage Investments IRA ROTH ACCOUNTS Planned Jane and Accounts Planned Jane and After Tax After Tax After Tax Income																	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts	Planned	Jane	Jane SS	Travel	Income Tax	After Tax	After Tax Target	Income	Year	
					1	100.0		Total	Distribution	Wages	-			Income	Income	Gap		
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Subtotal							from total		
honus %		0.00 %		0.00 %	Jane inc	0.00 %		1,040,000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to		
w/bonus	1	500,000		1,000,000		40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %	Litter		3.00 %	target		
2025	62	535,633	(15,633)	1.050,000	0	49,400	(7,000)	1.635,033	(22,633)	150,000	0	0	(27.367)-17%	100,000	100,000	0	2025	1
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	1 0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	1
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	1
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	1 1
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ackgrounds ind	dicate hypoth/	etical returns															- 1

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DUE, J	ane															INIT	TAL PLAN DAT	E: 01/01/202	25
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH G	GRAPHS	F	EPORTS	TOOLS			REVIS	SED PLAN DAT	E: 12/11/202	24
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Planning	nning 16 years V Brokerage Investments IRA ROTH Incomes K Expenses																		
Horizon		Brokerage	Investments		IKA	R	UTH				inco	mes	Expenses.						_
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Ja Wa	ne Jes	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %					-	-				inteenie		5	1
initial amount		500,000		1,000,000	100000	40,000		1,540,000	Subtotal	1.0		1-0 5	1-0 5	F# T D-4-		1.0 5	from total		
w/bonus		500.000		1 000 000	Jane Inc	40,000 %		1 540 000	of account incomes	101	actor	1 50 %	2 00 %	Eff Tax Rate		3 00 %	Income to		
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	15	50,000	0	0	(27,367)-17%	100,000	100,000	0	2025	1
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	15	53,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	15	56,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647		0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436		0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	6/	3/4,521	112,915	1,340,096	0	83,283	0	1,/9/,899	112,915		0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	60	163 725	120 196	1,407,100	0	03,200	0	1,700,300	120 106		0	34,110	(31,212)	0.0%	122 097	122.097	0	2031	
2032	70	46.271	124,003	1,551,328	0	99,191	0	1,696,790	124,003		0	35,147	(32,473)	0-0%	126,677	126,677	0	2032	
2034	71	0	48,122	1.573.054	55.840	105,143	0	1.678.196	103,963		0	35.675	0	(9.160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	-	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	1
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585		0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127		0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817		0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659		0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660		0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
			663,905		851,878		(21,000)		1,494,782	45	59,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ckgrounds in	dicate hypoth	etical returns																

Step 16: First row of the Client's Wages Column: The number represents the end of the year wage.

Step 17: Second Row of the Client's Wages Column: The number in the second row and on represents the end of the year client's wages along with the inflation factor added to it.

															YOUR CAS	E LIST SE	TTINGS H	ELP SIG	GN OUT
Doe la	ane																PREPARED BY	: DEMO AD	VISOR
200, 00	unc															INIT	IAL PLAN DATE	E: 01/01/20	25
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH 0	GRAPHS	R	EPORTS	TOOLS			REVIS	SED PLAN DATE	E: 12/11/20	24
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onaon		100111	c i iui	innig															
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Scenario Star	ting Plan Dem	20					×												
Star	Taxable x ^e Tax-Deferred x ^e Tax-Free x ^e																		
	nning <u>16 years</u> Brokerage Investments IRA ROTH Incomes * Expenses*																		
Planning	nning <u>16 years</u> Brokerage Investments IRA ROTH Incomes K Expenses																		
Horizon	Inning Taxable Tax-Deferred Tax-Free Tax-Deferred Tax-Defer																		
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Ja Wa	ne Jes	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %									-				
initial amount		500,000		1,000,000	1	40,000		1,540,000	Subtotal			1.0 5	1-0 5	54 T. D. L.		1.0 5	from total		
bonus %		500.000		1 000 000	Jane Inc	40,000		1 540 000	of account incomes	Inti	actor	1 50 %	2 00 %	Eff Tax Rate		3 00 %	Income to		
2025	62	535.633	(15.633)	1.050.000	0	49,400	(7.000)	1.635.033	(22.633)	15	0.000	0	2.00 %	(27.367)-17%	100.000	100.000	0	2025	1.1
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	15	53,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	15	56,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647		0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	<u> </u>	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915		0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	68	2/3,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501		0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	70	103,725	120,196	1,477,400	0	93,577	0	1,/34,/5/	120,190		0	34,028	(31,830)	0-0%	122,987	126,987	0	2032	
2034	71	40,2/1	48.122	1.573.054	55.840	105 143	0	1,678,196	103 963		0	35,675	(32,473)	(9.160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1.530.518	121,189	111.451	0	1.641.969	121,189		0	36,210	0	(23.007)-15%	134,392	134,392	0	2035	
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585		0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127		0	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817		0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659		0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660		0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
			663,905		851,878		(21,000)		1,494,782	45	59,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ckgrounds ind	dicate hypothe	etical returns																

															YOUR CAS	E LIST SE	TTINGS H	ELP SIGN OUT
Doe. J	ane																PREPARED BY	: DEMO ADVISOR
					OW AND TAX A		00FT 4110047			DADUG			0010			INIT	TAL PLAN DATE	: 01/01/2025
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASHFL	OW AND TAX A	DVISOR A	ISSET ALLOCAT	TION AND NET	WORTH C	SRAPHS	6 I 16	REPORTS	TOOLS			REVI	SED PLAN DATE	12/11/2024
Structi Edit Dynamic		ncom	e Plan	ning														
Scenario Star	ting Plan Dem	10					~											
		Таха	ble 🔎	Tax-De	eferred $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	Tax-I	Free 🔊											
Planning Horizon	16 years ∨	Brokerage	Investments		IRA	R	отн				Inco	mes 📈	Expenses					
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Ja Wa	ine ges	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year
net return initial amount bonus % w/bonus	61	4.00 % 500,000 0.00 % 500,000		5.00 % 1,000,000 0.00 % 1,000,000	Jane IRA Jane inc	6.00 % 40,000 0.00 % 40,000		1,540,000 0 1,540,000	Subtotal of account	Infl	actor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	from total income to	
2025	62	535,633	(15,633)	1,000,000	0	40,000	(7,000)	1,540,000	(22,633)	1	00 % 0,000	1.50 %	2.00 %	(27,367)-17%	100,000	3.00 %	target 0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	1	8,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2028	65	555.888	76.647	1,215,506	0	74,121	(7,000)	1,845,516	76.647	- 'I	0,000	32.626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436		0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915		0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501		0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,/25	120,196	1,4//,455	0	93,577	0	1,/34,/5/	120,196		0	34,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	40,271	48 122	1,551,526	55.840	105 143	0	1,696,790	103 963		0	35,147	(32,473)	(9160)-10%	130 477	130 477	0	2033
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189		0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585		0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127		0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817		0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659		0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	17	0	662.005	1,210,146	051 070	149,147	(21.000)	1,359,292	1 404 792	45	0 060	39,008	(156 101)	(27,872)-15%	2015 699	2015 699	0	2040
Orange ba	ekarounde inc	licate hypothe	etical returns		031,078		(21,000)		1,494,782	45	19,000	404,491	(100,121)	(240,024)	2,010,088	2,010,088	0	
orange Da	iongiounus III	noate hypothe	enedi returlis															

Step 18: Last Row of the Wages Incomes Column: These numbers represent the sums of all wages amounts.

Step 19: Social Security: This column represents the Social Security distribution amount. The monetary amount begins at the retirement age specified in the client information section of the client dashboard. The inflation factor corresponds to the percentage entered in the income section of the client dashboard.

SIPS															YOUR CAS	E LIST SE	TTINGS H	IELP SIG	N OUT
Doe Ja	ane																PREPARED B	Y: DEMO AD	VISOR
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CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	OVISOR A	SSET ALLOCAT	TION AND NET	WORTH G	BRAPHS F	REPORT	S I	TOOLS			REVI	SED PLAN DAT	E: 12/11/20	24
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Planning	ning 16 years Brokerage Investments IRA ROTH Incomes K Expenses K																		
10112011	Ining izon If years Brokerage Investments IRA ROTH Incomes Accounts Planed Jane One After Tax After Tax Incomes																		
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts	Planned	Jane	Jar	SS	Travel	Income Tax	After Tax	Target	Income	Year	
								Total	Distribution	wages					income	Income	Gap		
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Subtotal								from total		L 1
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		1,040,000	of account	Infl Factor	Infl	actor	Infl Factor	Eff Tax Rate		Infl Factor	income to		11
w/bonus		500,000		1,000,000		40,000		1,540,000	incomes	2.00 %	1	50 %	2.00 %			3.00 %	target		
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000		0	0	(27,367)-17%	100,000	100,000	0	2025	7
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000		0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060		0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	66	555,888	100 426	1,215,500	0	74,121	0	1,845,510	100.426	0		32,626	(20,000)	0-0%	109,273	109,273	0	2028	
2029	67	374 521	112 015	1,270,202	0	83,283	0	1 707 800	112 915	0		33 612	(30,000)	0-0%	115,007	115,007	0	2029	1
2031	68	273,000	116 501	1 407 100	0	88,280	0	1,768,380	116 501	0		34 116	(31,212)	0-0%	119,405	119 405	0	2031	
2032	69	163,725	120,196	1.477.455	0	93.577	0	1.734.757	120,196	0		34.628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	3	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	3	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	3	36,210	0	(23,007)-15%	134,392	134,392	0	2035	
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	3	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	1	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0		37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,/04	0	1,430,996	139,659	0		38,432	0	(26,832)-15%	151,259	151,259	0	2039	-
2040	//	U	663.005	1,210,146	951 979	149,147	(21.000)	1,359,292	1 494 792	459.060	44	64 401	(156 121)	(246 524)	2 015 699	2 015 699	0	2040	F
-			000,905		001,078		(21,000)		1,494,782	409,000	40	04,491	(100,121)	(240,324)	2,010,088	2,010,088	0		
Orange ba	ickgrounds ind	iicate hypoth	etical returns																

Step 20: First Row of the Client's Social Security Column: The number represents the end of the year wage of the social security.

															YOUR CAS	E LIST SE	TTINGS H	ELP SIG	N OUT
Doe. Ja	ane																PREPARED BY	DEMO AD	VISOR
				Lougur		DU0000	COLT ALLOCAT				FOODT		0010			INIT	TAL PLAN DATE	01/01/202	25
CLIENT DASHBO	ARD STRU	ICTORED INCO	ME PLANNING	CASH FL	UW AND TAX A	DVISOR A	ASSET ALLUGA	TION AND NET	WORTH C	RAPHS P	EPURI	5 1 1	IUULS			REVIS	SED PLAN DATE	: 12/11/203	24
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Lanaration	Taxable * Tax-Deferred * Tax-Free																		
	ming 16 years Protecting Investments IPA POTH																		
Planning	ning <u>16 years</u> Brokerage Investments IRA ROTH Incomes <u>Kepenses</u> Expenses																		
Horizon	Ining to get																		
Veer	Inne	1	Income	A	Income	Annual	Income	Accounts	Planned	Jane			Travel	Income Tex	After Tax	After Tax	Income	Maar	1
rear	Jane	Account	income	Account	income	Account	income	Total	Distribution	Wages	Jan	:55	Travel	income tax	Income	Income	Gap	rear	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %										0			
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal								from total		
bonus %		0.00 %		0.00 %	Jane Inc	0.00 %		1 540 000	of account	Infl Factor	Infi	actor	Intl Factor	Eff Tax Rate		Inti Factor	income to		
w/bonus	62	500,000	(15 6 2 2)	1,000,000	0	40,000	(7.000)	1,540,000	(00.622)	2.00 %	-	50 %	2.00 %	(07.267) 17%	100.000	3.00 %	target	2025	
2025	63	571 689	(14,631)	1 102 500	0	59 364	(7,000)	1,033,033	(22,033)	153,000			0	(28 369)-17%	103,000	103,000	0	2025	
2027	64	608 207	(13,650)	1157 625	ő	69.926	(7,000)	1,835,758	(20,650)	156,060			0	(29,320)-17%	106,000	106,000	0	2027	
2028	65	555.888	76.647	1,215,506	ő	74.121	(1,000)	1.845.516	76.647	0	3	32.626	0	0-0%	109,273	109.273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1.823.538	109,436	0	3	3,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	3	3,612	(30,600)	0-0%	115,927	115,927	0	2030	1
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	3	84,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	3	84,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	3	35,147	(32,473)	0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	3	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	3	86,210	0	(23,007)-15%	134,392	134,392	0	2035	
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	3	86,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	3	37,304	0	(24,855)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	3	87,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	3	88,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	1 3	89,008	0	(27,872)-15%	155,797	155,797	0	2040	1
			663,905		851,878		(21,000)		1,494,782	459,060	46	64,491	(156,121)	(246,524)	2,015,688	2,015,688	0		
Orange ba	ckgrounds inc	licate hypoth	etical returns																

Step 21: Second Row of the Client's Social Security Column: The number in the second row and on represents the end of the year client's social security along with the inflation factor added to it.

															YOUR CAS	E LIST SE	TTINGS H	ELP SIGN OU
Doe .l	ane																PREPARED B	: DEMO ADVISO
000,0	unc															INIT	IAL PLAN DAT	: 01/01/2025
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	OVISOR	SSET ALLOCAT	TION AND NET	WORTH G	RAPHS	EPORTS	т а	OOLS			REVIS	SED PLAN DAT	E: 12/11/2024
Ctructu	urad b	2000		ning														
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	Taxable X Tax-Deferred X Tax-Free X																	
	ning 16 years Brokerage Investments IRA ROTH																	
Planning	ning 16 years Brokerage Investments IRA ROTH Incomes Expenses.																	
Horizon	Taxable Tax-Deferred Tax-Free Ining izon 16 years Brokerage Investments IRA ROTH																	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jan	SS	Travel	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %										Income		
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal								from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account	Infl Factor	Infl	actor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
w/bonus		500,000		1,000,000		40,000		1,540,000	incomes	2.00 %	1	50 %	2.00 %			3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000		0	0	(27,367)-17%	100,000	100,000	0	2025
2026	64	5/1,689	(14,631)	1,102,500	0	59,364	(7,000)	1,/33,553	(21,631)	153,000			0	(28,369)-17%	105,000	103,000	0	2026
2027	65	555 888	76.647	1,137,023	0	74 121	(7,000)	1,845,516	76.647	130,000		626	0	(29,320)-17%	100,030	100,050	0	2027
2029	66	468,688	109,436	1.276.282	0	78,569	0	1.823.538	109,436	0	3	3,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	3	3.612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	3.	4,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	3	4,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	3	5,147	(32,473)	0-0%	126,677	126,677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	3	5,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	3	6,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	105 006	0	1,599,596	125,585	0	3	7 20/	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,420,404	130,127	120,220	0	1 404 508	134,817	0	3	7,304	0	(25.827)-15%	142,576	142,576	0	2037
2039	76	0	0	1,290,292	139.659	140,704	0	1,430,996	139.659	0	3	8.432	0	(26.832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1.359.292	144,660	0	3	9.008	0	(27.872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	1,494,782	459,060	46	4,491	(156,121)	(246,524)	2,015,688	2,015,688	0	1
Orange ba	ckgrounds inc	dicate hypothe	etical returns															

Step 22: Last Row of the Social Security Income Column: These numbers represent the sums of all the social security amounts.

															YOUR CAS	E LIST SE	TTINGS HE	LP SIGN OUT
Doe Ja	ane																PREPARED BY	DEMO ADVISOR
200,0	ano															INIT	IAL PLAN DATE	01/01/2025
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	BRAPHS F	EPORTS	т	OOLS			REVIS	ED PLAN DATE	12/11/2024
Structu	urod lu	ncom	o Dlar	nina														
Silucii	ureu n	ICOIII	eriai	innig														
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Star	Taxable * Tax-Free *																	
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	ning 16 years V Ronkerane Investments IRA ROTH																	
Planning Horizon	ing 16 years v Brokerage Investments IRA ROTH Incomes * Expenses*																	
	Taxable Tax-Deferred Tax-Free ning izon 16 years Brokerage Investments IRA ROTH																	
Year	Jane	Account	Income	Account	Income	Account	Income	Total	Distribution	Jane Wages	Jane	SS	Travel	Income Tax	Income	Target	Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %										interne		
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal								from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account	Infl Factor	Infl	actor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
W/bonus	62	500,000	(15 6 2 2)	1,000,000	0	40,000	(7,000)	1,540,000	(22.622)	2.00 %	-	50 %	2.00 %	(27.267) 17%	100.000	3.00 %	target	2025
2025	63	571 689	(14,631)	1,030,000	0	59 364	(7,000)	1,033,033	(22,033)	153,000		0	0	(28 369)-17%	103,000	103,000	0	2025
2027	64	608 207	(13,650)	1157 625	0	69,926	(7,000)	1 835 758	(20,650)	156,060		ő	0	(29,320)-17%	106,000	106,000	0	2027
2028	65	555 888	76 647	1 215 506	0	74 121	(7,000)	1 845 516	76 647	100,000		626	0	0-0%	109,273	109,273	0	2028
2029	66	468.688	109.436	1,276,282	0	78,569	0	1.823.538	109.436	0		8.115	(30.000)	0-0%	112.551	112,551	0	2029
2030	67	374.521	112,915	1.340.096	0	83,283	0	1,797,899	112,915	0	3	3.612	(30.600)	0-0%	115.927	115.927	0	2030
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0		1,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0		1,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0		5,147	(32,473)	0-0%	126,677	126,677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0		5,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	3	5,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	1	5,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0		7,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0		7,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0		8,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	3	9,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	46	4,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds inc	licate hypoth	etical returns															

Step 23: Expenses: Expenses are modeled like a negative income. If a number is in (parenthesis), it is an expense. If the number is zero it means that there was no expense in that year.

												T		YOUR CAS	E LIST SE	TTINGS H	IELP SIG	N OUT
Doe Ja	ane															PREPARED B	Y: DEMO AD	VISOR
200,00	anc											_			INIT	TAL PLAN DAT	E: 01/01/202	25
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	OVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS	EPORTS	TOOLS			REVIS	SED PLAN DAT	E: 12/11/202	24
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Scenario Star	ting Plan Dem	10					~											
	Taxable X Tax-Deferred X Tax-Free																	
		Taxa	able	Tax-De	ferred	Tax-	Free											
Planning	16 years ∽	Brokerage	Invectmente		DA	P	отн			Inco	mac 7 ^k	Expanses						
Horizon	Ing on If years Brokerage Investments IRA ROTH Year Jane Account Income Accounts Planned Jane Jane SS Travel Income Tax After Tax Income Year																	
Vear	Jane	Account	Income	Account	Income	Account	Income	Accounts	Planned	Jane	Jane SS	Travel	Income Tax	After Tax	After Tax Target	Income	Vear	
- Cui	ound	rooount	moonie	rooount	moonie	Rooount	moonne	Total	Distribution	Wages	oune oo	Haver	income rux	Income	Income	Gap	rear	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 540 000	Subtotal							from total		
honus %		0.00 %		0.00 %	Jane inc	40,000		1,540,000	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to		
w/bonus		500,000		1.000.000	ourie ine	40,000		1,540,000	incomes	2.00 %	1.50 %	2.00 %	Litraxitate		3.00 %	target		
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	1
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	69	103,/25	120,196	1,477,455	0	93,577	0	1,/34,/5/	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	40,271	49 122	1,551,328	55.940	105 143	0	1,090,/90	124,003	0	35,147	(32,473)	(9160)-10%	120,077	120,077		2033	
2035	72	0	40,122	1,575,054	121 180	111 451	0	1 641 969	121 180	0	36,075	0	(23,007)-15%	134 392	134 302	0	2034	
2036	73	0	0	1 481 458	125 585	118 138	0	1 599 596	125 585	0	36,753	0	(23,915)-15%	138 423	138 423	0	2036	
2037	74	0	0	1.425.404	130,127	125.226	0	1.550.631	130,127	0	37.304	0	(24.855)-15%	142.576	142.576	o o	2037	
2038	75	0	0	1.361.858	134,817	132,740	0	1,494,598	134,817	0	37.864	0	(25.827)-15%	146.853	146.853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	1
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		÷
Orange ba	ckgrounds ind	licate hypothe	etical returns															

Step 24: Last Row of the Expenses Column: This number represents the sum of the expenses amount. If a number is in (parenthesis), it represents how much was withdrawn.

														YOUR CAS	E LIST SE	TTINGS H	ELP SIG	IN OUT
Doe J	ane															PREPARED BY	: DEMO AD	VISOR
200,0	anto														INIT	IAL PLAN DATE	E: 01/01/20	25
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH 0	BRAPHS R	EPORTS 1	OOLS			REVIS	SED PLAN DATE	E: 12/11/20	24
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Structi	areu n	100111	e i iui	ming														
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Jul	Taxable x ^d Tax-Deferred x ^d Tax-Free x ^d																	
	Ing 16 years V																	
	ing <u>16 years v</u> Brokerage Investments IRA ROTH Incomes * Expenses*																	
Planning Horizon	ng 16 years V Brokerage Investments IRA ROTH Incomes Expenses Expenses Incomes After Tax After Tax Income																	
								Accounte	Planned	lane				After Tay	After Tax	Income		٦.
Year	Jane	Account	Income	Account	Income	Account	Income	Total	Distribution	Wages	Jane SS	Travel	Income Tax	Income	Target	Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %											5	
initial amount		500,000		1,000,000	lana ina	40,000		1,540,000	Subtotal	Infl Easter	Infl Easter	Inf Easter	Eff Tax Pate		Infl Easter	from total		
w/bonus		500.000		1.000.000	Jane Inc	40.000		1.540.000	incomes	2.00 %	1.50 %	2.00 %	LIT Tax Nate		3.00 %	target		
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025	1
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(0,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(0,600)	0-0%	115,927	115,927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(1,212)	0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(1,836)	0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(2,473)	0-0%	126,677	126,677	0	2033	
2034	/1	0	48,122	1,5/3,054	55,840	105,143	0	1,6/8,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034	
2035	/2	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035	
2030	73	0	0	1,401,458	125,585	105,006	0	1,599,596	125,585	0	30,/53	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,423,404	130,12/	120,220	0	1,000,031	130,127	0	37,304	0	(24,000)-15%	142,5/6	142,5/6	0	2037	1
2030	76	0	0	1 200 202	139,659	140 704	0	1 430 996	139,659		38 432	0	(26.832)-15%	151 259	151 259	0	2030	1
2040	77	0	0	1 210 146	144.660	140,704	0	1 350 202	144.660	0	39,008		(27,872)-15%	155 707	155 797	0	2040	
2040		0	663.905	1,210,140	851.878	147,147	(21,000)	1,009,292	1.494.782	459.060	464.491	(156.121)	(246.524)	2.015.688	2.015.688	0	2040	1
Orange ba	ckarounds inc	dicate hypoth	etical returns)	221,070		(=1,000)		.,	.55,000		((= 10,024)	2,2 . 0,000	2,2 . 0,000			
		and the other																

Step 25: Income Tax: This column represent the monetary and percentage amount of Income tax that would be paid in that year.

													1	YOUR CAS	e list se	TTINGS H	ELP SIGN OUT
Doe la	ane															PREPARED BY	DEMO ADVISOR
DUC, 0	anc														INIT	IAL PLAN DATE	01/01/2025
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET	WORTH G	RAPHS R	EPORTS 1	OOLS			REVIS	SED PLAN DATE	12/11/2024
Structu	urod lu	acom		ning													
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Scenario Star	Taxable																
	Tax-Deferred X ^K Tax-Free X ^K																
	Ing To years V Protection Intermediate IPA POTH																
Planning Horizon	ng 16 years V Brokerage Investments IRA ROTH Incomes K Expenses Expenses After Tax																
2010/01	ng <u>16 years</u> Brokerage Investments IRA ROTH Incomes <u>FExpenses</u> Expenses After Tax After Tax Income years																
Year	Jane	Account	Income	Account	Income	Account	Income	Total	Distribution	Wages	Jane SS	Travel	Income Tax	Income	Target Income	Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 5 40 000	Cubtotol							from total	
honus %		0.00 %		0.00 %	lane inc	40,000		1,540,000	of account	Infl Eactor	Infl Factor	Infl Eactor	Eff Tay Pate		Infl Eactor	income to	
w/bonus		500,000		1.000.000	ourie me	40.000		1.540.000	incomes	2.00 %	1.50 %	2.00 %	LITTUX HUIC		3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	6/	3/4,521	112,915	1,340,096	0	83,283	0	1,/9/,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	60	163 725	120 196	1,407,100	0	03 577	0	1,700,300	120 106	0	34,110	(31,212)	0.0%	122 097	122.097	0	2031
2032	70	46 271	124,003	1 551 328	0	99 191	0	1,696,790	124,003	0	35 147	(32,473)	0-0%	126,677	126 677	0	2032
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds inc	licate hypothe	etical returns														

Step 26: Last Row of the Income Tax Column: This number represents the total income taxes paid over the plan horizon.

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DUC, 0	anc															INIT	IAL PLAN DATE	01/01/2025	5
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	OVISOR	SSET ALLOCA	TION AND NET	WORTH G	RAPHS	EPORTS 1	TOOLS				REVIS	SED PLAN DATE	: 12/11/2024	1
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	Taxable $\overset{\mathcal{A}^{d'}}{\longrightarrow}$ Tax-Deferred $\overset{\mathcal{A}^{d'}}{\longrightarrow}$ Tax-Free $\overset{\mathcal{A}^{d'}}{\longrightarrow}$																		
	anning 16 years ~ new temperature IDA DOTU																		
Planning	anning 16 years V Brokerage Investments IRA ROTH Incomes K Expenses																		
Horizon	anning 16 years v Brokerage Investments IRA ROTH Incomes K Expenses Expenses																		
	Inning 16 years V Brokerage Investments IRA ROTH Incomes K Expenses Expenses A After Tax After Tax Income I																		
Year	Income Recount Income Account Income Account Income Accounts Planed Jane Jane SS Travel Income Tax After Tax After Tax Income Year																		
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %										income			
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal								from total		
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Eff T	x Rate		Infl Factor	income to		
w/bonus		500,000	(45.600)	1,000,000		40,000	(7.000)	1,540,000	incomes	2.00 %	1.50 %	2.00 %	(07.0)	0.470	400.000	3.00 %	target	0005	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,035,033	(22,633)	150,000	0	0	(27,30)-17%	100,000	100,000	0	2025	
2020	64	608 207	(13,650)	1157625		69,926	(7,000)	1,735,555	(20,650)	156,060		0	(20,30	1.17%	106,000	106,000	0	2020	
2028	65	555 888	76 647	1 215 506	ő	74 121	(7,000)	1 845 516	76 647	0	32 626	0	(23,02	0-0%	109,273	109,273	0	2028	
2029	66	468.688	109.436	1,276,282	ő	78,569	Ő	1.823.538	109,436	0	33,115	(30,000)		0-0%	112.551	112,551	0	2029	
2030	67	374.521	112,915	1.340.096	0	83,283	0	1,797,899	112,915	0	33.612	(30,600)		0-0%	115.927	115.927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)		0-0%	119,405	119,405	0	2031	
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)		0-0%	122,987	122,987	0	2032	
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)		0-0%	126,677	126,677	0	2033	
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,16)-10%	130,477	130,477	0	2034	
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,00)-15%	134,392	134,392	0	2035	6
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,91	5)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,85	5)-15%	142,576	142,576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,82	7)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,8)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,87	2)-15%	155,797	155,797	0	2040	6
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(2	46,524)	2,015,688	2,015,688	0		<u> </u>
Orange ba	ckgrounds inc	licate hypoth	etical returns																

Step 27: After Tax Income Column: This column represents the after-tax income that the plan produced.

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														YOUR CAS	E LIST SE	TTINGS H	ELP SIGN	OUT
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CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH	BRAPHS R	EPORTS	TOOLS			REVIS	SED PLAN DAT	E: 12/11/2024	1
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	aming 16 years ~ Rickerane Investments IRA BOTH																	
Planning Horizon	16 years Brokerage Investments IRA ROTH Incomes Expenses Expenses																	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target Income	Income Gap	Year	
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %									interne		-	
initial amount		500,000		1,000,000	100000	40,000		1,540,000	Subtotal	1.0 5	1.0 5	1-0 5	F# T D-++-		1-0 F	from total		
w/bonus		500.000		1 000 000	Jane Inc	40.000 %		1 540 000	of account	2 00 %	1 50 %	2 00 %	Eff Tax Rate		3 00 %	Income to		
2025	62	535.633	(15.633)	1.050.000	0	49,400	(7.000)	1.635.033	(22.633)	150.000	0	2.00 %	(27.367)-17%	100.000	100.000	0	2025	
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026	
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027	
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028	
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029	
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030	
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031	
2032	59	163,/25	120,196	1,4//,455	0	93,577	0	1,/34,/57	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032	
2033	70	40,271	48 122	1,551,328	55.840	1051/12	0	1,090,790	103 962	0	35,147	(32,473)	(9160)-10%	120,077	130 477	0	2033	
2035	72	0	40,122	1 530 518	121 189	111 451	0	1 641 969	121 190	0	36,075	0	(23,007)-15%	134 392	134 302	0	2034	
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036	
2037	74	0	0	1,425,404	130,127	125.226	0	1.550.631	130,127	0	37,304	0	(24.855)-15%	142.576	142.576	0	2037	
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038	
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039	
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040	
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0		- I
Orange ba	ckgrounds ind	licate hypoth	etical returns															

Step 28: Last Row of the After Tax Income Column: This number represents the total after-tax income produced

over the plan horizon.

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Doe I	ane															PREPARED BY	: DEMO ADVISOR
000,0	unc														INI	TIAL PLAN DATE	E: 01/01/2025
CLIENT DASHBO	ARD STRU	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS 1	OOLS			REV	SED PLAN DATE	E: 12/11/2024
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Scenario Star	ting Plan Den	no					\sim										
	anning 16 years v Brokerage Investments IRA ROTH Incomes * Expenses* Expenses*																
Planning Horizon	nning 16 years V Jane Account Income																
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Ta	After Tax Target Income	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		and the second se							-		
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal							from total	
w/bonus		500.000		1 000 000	Jane Inc	40.000 %		1 540 000	of account incomes	2 00 %	1 50 %	2 00 %	Eff Tax Rate		Inti Factor	income to	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22.633)	150,000	0	0	(27,367)-17%	10.0	00 100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	10 8,0	00 103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	105,0	90 106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	10,2	73 109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,5	51 112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	10,9	27 115,927	0	2030
2031	60	163 725	120 196	1,407,100	0	03,200	0	1,700,300	120 106	0	34,110	(31,212)	0-0%	1100	97 122.097		2031
2032	70	46 271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	1256	77 126 677	0	2032
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130.4	77 130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	13 4,3	92 134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	13 8,4	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	14 2,5	76 142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	14 5,8	53 146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	142	59 151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,7	97 155,797	0	2040
			663,905	_	851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,6	88 2,015,688	0	0
Orange ba	ckgrounds in	dicate hypoth	etical returns														

Step 29: After Tax Target Income Column: This column represents the after tax target income that the client would like to have.

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CLIENT DASHBO	ARD STRU	CTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCAT	TION AND NET	WORTH G	RAPHS R	EPORTS 1	OOLS			REVI	SED PLAN DATE	12/11/2024
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	nning 16 years V Brokerage Investments IRA ROTH Incomes K Expenses C																
Planning Horizon	ng <u>16 years ×</u> Brokerage Investments IRA ROTH Incomes × Expenses Expenses After Tax																
Mana	ng 16 years 7 Brokerage Investments IRA ROTH Income X Expenses Expenses Expenses Income Tax After Tax Income Account Income Ac															Income	Mana
Year	Jane	Account	Income	Account	Income	Account	income	Total	Distribution	Wages	Jane 55	Travel	Income Tax	Income	Income	Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1 5 10 000									
initial amount		500,000		1,000,000	lane inc	40,000		1,540,000	Subtotal	Infl Eactor	Infl Eactor	Infl Eactor	Eff Tay Pate		Infl Factor	income to	
w/bonus		500.000		1.000.000	oune me	40.000		1.540.000	incomes	2.00 %	1.50 %	2.00 %	En lax Nate		3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	2/3,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	70	103,725	120,196	1,477,455	0	93,577	0	1,/34,/5/	120,196	0	34,028	(31,830)	0-0%	122,987	122,987	0	2032
2034	70	40,271	48 122	1,531,520	55.840	105 143	0	1,050,790	103.963	0	35,147	(32,473)	(9160)-10%	130,477	130,477		2034
2035	72	0		1,530,518	121 189	111.451	0	1 641 969	121,189	0	36,210	0	(23,007)-15%	134,392	134.392	0	2035
2036	73	0	0	1.481.458	125,585	118,138	0	1.599.596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	o	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	1
Orange ba	ckgrounds inc	licate hypothe	etical returns														

Step 30: After Tax Target Income Infl Factor: This percentage amount represents how much percentage wise they

target income will rise per year due to inflation.

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DUE, J	ane														IN	TIAL PLAN DATE	01/01/2025
CLIENT DASHBO	ARD STRU	CTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS 1	OOLS			REV	ISED PLAN DATE	12/11/2024
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	anning rizon Taxable Tax-Deferred Tax-Free Tax-Free Tax-Free Tax-Free Tax-Free Tax-Free Tax-Free Tax-Free Tax-Free Tax-Free Tax-																
Planning	nning 16 years V Brokerage Investments IRA ROTH Incomes K Expenses K																
Horizon	Ianning 16 years V Brokerage Investments IRA ROTH Incomes Kepenses																
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts	Planned	Jane	Jane SS	Travel	Income Tax	After Tax	Afte Tax Ta get	Income	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		rotar	Distribution	mages				income	Income	oup	
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal						•	from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
w/bonus	10	500,000	(1.5.4.6.0)	1,000,000		40,000	(7.0.0.0)	1,540,000	incomes	2.00 %	1.50 %	2.00 %	(0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.		3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2027	64	608 207	(13,650)	1 157 625	ő	69.926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29.320)-17%	106,000	106,000	ů	2027
2028	65	555,888	76.647	1.215.506	ō	74,121	0	1.845.516	76.647	0	32.626	0	0-0%	109.273	109.273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	/2	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,401,458	125,585	105,138	0	1,599,596	125,585	0	30,/53	0	(23,915)-15%	138,423	138,423		2030
2038	75	0	0	1 361 858	134,817	132 740	0	1 494 598	134,817	0	37,864	0	(25.827)-15%	146,853	146,853		2038
2039	76	0	0	1,290,292	139.659	140,704	0	1,430,996	139.659	0	38,432	0	(26.832)-15%	151,259	151,259		2039
2040	77	0	0	1,210,146	144.660	149.147	0	1.359.292	144.660	0	39.008	0	(27.872)-15%	155,797	155,797	0	2040
		•	663,905	,,	851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds ind	licate hypothe	etical returns									,,	,				

Step 31: First Row of the After Tax Target Income Column: This number represents the year end of the after tax target income.

														YOUR CAS	E LIST SE	TTINGS H	ELP SIGN OUT
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CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH G	RAPHS	EPORTS 1	OOLS			REVI	SED PLAN DATE	12/11/2024
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	anning 16 years X																
	anning 16 years V Brokerage Investments IRA ROTH Incomes Expenses																
Planning Horizon	Income Income Expenses Var Income Account Income Account Expenses																
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	Afte Tax Ta get Inc. me	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %											
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal							from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl. actor	income to	
W/bonus	60	500,000	(15 6 9 9)	1,000,000	0	40,000	(7.000)	1,540,000	incomes (02.622)	2.00 %	1.50 %	2.00 %	(07.967) 17%	100.000	3.00 %	target	2025
2025	63	571 689	(14,631)	1 102 500	0	59 364	(7,000)	1,035,035	(22,033)	153,000	0	0	(28 369)-17%	103,000	103,000	0	2025
2027	64	608.207	(13.650)	1.157.625	ő	69,926	(7.000)	1.835.758	(20.650)	156.060	Ő	0	(29.320)-17%	106.090	106.090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	273,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405	0	2031
2032	69	163,725	120,196	1,477,455	0	93,577	0	1,734,757	120,196	0	34,628	(31,836)	0-0%	122,987	122,987	0	2032
2033	70	46,271	124,003	1,551,328	0	99,191	0	1,696,790	124,003	0	35,147	(32,473)	0-0%	126,677	126,677	0	2033
2034	71	0	48,122	1,573,054	55,840	105,143	0	1,678,196	103,963	0	35,675	0	(9,160)-10%	130,477	130,477	0	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,401,458	125,585	105,138	0	1,599,596	125,585	0	30,/53	0	(23,915)-15%	138,423	138,423	0	2030
2038	75	0	0	1 361 858	134,817	132 740	0	1 494 598	134,817	0	37,864	0	(25.827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139.659	140,704	0	1,430,996	139,659	0	38,432	0	(26.832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144.660	149,147	0	1.359.292	144.660	0	39.008	0	(27.872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)	1000,000	1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds ind	licate hypoth	etical returns	2													

Step 32: Second Row of the After Tax Target Income Column: This number represent the year end of the after tax

target income with the inflation percentage factored in.

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CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	BRAPHS F	EPORTS	TOOLS			REV	ISED PLAN DATE	12/11/2024
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Planning Horizon	Planning Horizon 16 years Brokerage Investments IRA ROTH Incomes MEXPENSES Expenses Expenses Expenses Account Income Account I																
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	Afte Tax Ta get Inc me	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %					-						
initial amount		500,000		1,000,000	1000	40,000		1,540,000	Subtotal		1.05.00					from total	
w/bonus		500.000		1 000 000	Jane Inc	40.000 %		1 540 000	of account incomes	2 00 %	1 50 %	2 00 %	Eff Tax Rate		Inti actor	income to	
2025	62	535.633	(15.633)	1.050.000	0	49,400	(7.000)	1.635.033	(22.633)	150.000	0	0	(27.367)-17%	100.000	10.000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	2/3,000	116,501	1,407,100	0	88,280	0	1,768,380	116,501	0	34,116	(31,212)	0-0%	119,405	119,405		2031
2032	70	46 271	120,190	1,477,455	0	93,577	0	1,/34,/3/	120,190	0	35 147	(32,473)	0-0%	126,907	126,907		2032
2034	71	40,271	48 122	1 573 054	55.840	105 143	0	1 678 196	103 963	0	35.675	(02,470)	(9160)-10%	130,477	130.477	, o	2034
2035	72	0	0	1,530,518	121,189	111,451	0	1,641,969	121,189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	0	1,481,458	125,585	118,138	0	1,599,596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds in	dicate hypoth	etical returns														

Step 33: Last Row of the After Tax Target Income: This number represents the total after-tax income produced over the plan horizon.

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CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS T	OOLS			REVIS	ED PLAN DATE	12/11/2024
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	Income Income Account Income Year																
Year	Jane	Account	Income	Account	Income	Account	Income	Total	Distribution	Wages	Jane SS	Travel	Income Tax	Income	Inclime	Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %											
initial amount		500,000		1,000,000		40,000		1,540,000	Subtotal							from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl actor	income to	
w/bonus		500,000	(1.5.4.0.0)	1,000,000		40,000	(2.0.0.)	1,540,000	incomes	2.00 %	1.50 %	2.00 %	(0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.	100.000	3 00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	10,000	0	2025
2026	03	5/1,089	(14,031)	1,102,500	0	59,364	(7,000)	1,/33,553	(21,031)	153,000	0	0	(28,309)-17%	105,000	1,000	0	2020
2027	64	608,207	(13,050)	1,157,625	0	09,920	(7,000)	1,835,758	(20,050)	156,060	22.626	0	(29,320)-17%	100,090	10,090	0	2027
2028	66	469 699	100.426	1,215,500		79 560	0	1,040,010	100.426	0	32,020	(20,000)	0.0%	110 5,273	10,273	0	2020
2029	67	274 521	112,015	1,270,202	0	0,009	0	1,023,000	112,015	0	22,612	(30,600)	0.0%	115.027	1 5 0 2 7	0	2029
2030	68	273.000	116 501	1,340,090		88 280	0	1,757,855	116 501	0	34 116	(31,212)	0-0%	119,405	1 9,405	0	2030
2032	69	163 725	120,196	1 477 455	0	93 577	0	1 734 757	120 196	0	34.628	(31,836)	0-0%	122 987	12987	0	2032
2033	70	46 271	124,003	1,551,328	ő	99 191	0	1,696,790	124 003	0	35.147	(32,473)	0-0%	126.677	1 6 6 7 7	0	2033
2034	71	0	48.122	1.573.054	55.840	105.143	0	1.678.196	103,963	0	35.675	0	(9,160)-10%	130,477	1:0.477	0	2034
2035	72	0	0	1.530.518	121,189	111.451	0	1.641.969	121,189	0	36.210	0	(23.007)-15%	134.392	1,4.392	0	2035
2036	73	0	0	1.481.458	125.585	118,138	0	1,599,596	125.585	0	36,753	0	(23,915)-15%	138,423	13 8,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	1,2,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	1,6,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	11,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
	2.0		663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ackgrounds in	dicate hypoth	etical returns														

Step 34: Income Gap: This column indicates whether there is a monetary difference between the target income and

the actual income. If the numbers are in red this means there is a deficiency and the actual income is less than the target income. If the numbers are in green there is an excess which means the actual income exceeds the target income. If the number is zero (0) it means that the target income and the acutal income are equal. See the article Reaching the Target Income Goal Using the Make-Up Income Gap Based on Target Income Function for more information on how to resolve Income Gaps in your plan.

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CLIENT DASHBO	ARD STRU	JCTURED INCOM	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS	EPORTS	OOLS			REVI	SED PL <mark>AN DAT</mark>	12/11/2024
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Planning Horizon 16 years V Brokerage Investments IRA ROTH Incomes Expenses Expenses																	
Planning Horizon 16 years V Horizon 16 years V Vaer Iane Account Income Account Income Account Income Accounts Planned Jane Iane SS Travel Income Tax After Tax Income Vear																	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Travel	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	61	4.00 %		5.00 %	Jane IRA	6.00 %		1.540.000							income	<i>(</i>	
initial amount		500,000		1,000,000	lane inc	40,000		1,540,000	Subtotal	Infl Eactor	Infl Eactor	Infl Eactor	Eff Tay Pate		Infl Eactor	from total	
w/bonus		500.000		1.000.000	oune me	40.000		1.540.000	incomes	2.00 %	1.50 %	2.00 %	En lax Nate		3.00 %	target	
2025	62	535,633	(15,633)	1,050,000	0	49,400	(7,000)	1,635,033	(22,633)	150,000	0	0	(27,367)-17%	100,000	100,000	0	2025
2026	63	571,689	(14,631)	1,102,500	0	59,364	(7,000)	1,733,553	(21,631)	153,000	0	0	(28,369)-17%	103,000	103,000	0	2026
2027	64	608,207	(13,650)	1,157,625	0	69,926	(7,000)	1,835,758	(20,650)	156,060	0	0	(29,320)-17%	106,090	106,090	0	2027
2028	65	555,888	76,647	1,215,506	0	74,121	0	1,845,516	76,647	0	32,626	0	0-0%	109,273	109,273	0	2028
2029	66	468,688	109,436	1,276,282	0	78,569	0	1,823,538	109,436	0	33,115	(30,000)	0-0%	112,551	112,551	0	2029
2030	67	374,521	112,915	1,340,096	0	83,283	0	1,797,899	112,915	0	33,612	(30,600)	0-0%	115,927	115,927	0	2030
2031	68	2/3,000	120,106	1,407,100		88,280	0	1,768,380	120,106	0	34,110	(31,212)	0-0%	119,405	119,405	0	2031
2032	70	46 271	120,190	1,477,400		93,577	0	1,/34,/3/	120,190	0	34,020	(31,030)	0-0%	122,907	126,907	0	2032
2034	71	40,2/1	48 122	1,573,054	55.840	105 143	0	1 678 196	103 963	0	35,675	(32,473)	(9160)-10%	130 477	130 477	0	2034
2035	72	0	0	1,530,518	121.189	111.451	0	1 641 969	121 189	0	36,210	0	(23,007)-15%	134,392	134,392	0	2035
2036	73	0	o	1.481.458	125.585	118,138	0	1.599.596	125,585	0	36,753	0	(23,915)-15%	138,423	138,423	0	2036
2037	74	0	0	1,425,404	130,127	125,226	0	1,550,631	130,127	0	37,304	0	(24,855)-15%	142,576	142,576	0	2037
2038	75	0	0	1,361,858	134,817	132,740	0	1,494,598	134,817	0	37,864	0	(25,827)-15%	146,853	146,853	0	2038
2039	76	0	0	1,290,292	139,659	140,704	0	1,430,996	139,659	0	38,432	0	(26,832)-15%	151,259	151,259	0	2039
2040	77	0	0	1,210,146	144,660	149,147	0	1,359,292	144,660	0	39,008	0	(27,872)-15%	155,797	155,797	0	2040
			663,905		851,878		(21,000)		1,494,782	459,060	464,491	(156,121)	(246,524)	2,015,688	2,015,688	0	
Orange ba	ckgrounds inc	dicate hypothe	etical returns														

Step 35: Calendar Year: The leftmost and rightmost columns represent the calendar years within the timeframe.



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