

Condense/Uncondense Feature on the Cash Flow and Tax Advisor Page

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The condense/uncondensed button on the Cash Flow and Tax Advisor page is a feature that will condense or expand the display of income, expenses, and the income taxes on the page. This feature enables advisors to hide unpopulated rows within the Cash Flow and Tax Advisor tool. This allows them to focus on the rows with client taxable events and hide the extraneous information. Below is a step-by-step guideline on the condense/uncondensed button features.

To learn more about the Cash Flow and Tax Advisor menu see articles:

- [Condense/Uncondense Feature](#)
- [Hide/Unhide Tax Advisor](#)
- [Add Scenario Feature](#)
- [Calculating Feature](#)

To learn more about the Cash Flow and Tax Advisor individual column features see articles:

- [Hide/Unhide Feature for Individual Tax Columns](#)
- [Permanent Deletion for Individual Tax Columns](#)
- [Downloading a 1040 Sample Tax Form](#)

To learn more about forecasting effective tax rates see articles:

- [Part One: Forecasting Effective Tax Rates While the Client is working](#)
- [Part Two: Forecasting Effective Tax Rates While the Client is in retirement and before Social Security Disbursements](#)
- [Part Three: Forecasting Effective Tax Rates While the Client is in Retirement and Social Security Starts Up](#)
- [Part Four: Forecasting Effective Tax Rates in Retirement: RMDs, Social Security, and Roth Withdrawals](#)
- [Part Five: Adding Expenses into the Cash Flow and Tax Advisor Calculator](#)

Step 1: Cash Flow and Tax Advisor: Click on the Cash Flow and Tax Advisor heading underneath the Client's name.

Doe, Jane

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

Structured Income Planning

Edit Dynamic Mode

Scenario Condense and Uncondense Feature

Planning Horizon	20 years		Non-Qualified		IRA											
	Year	Jane	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	64	5.00 %			5.00 %	Jane IRA										
initial amount		750,000			1,250,000		2,000,000	Subtotal of account incomes	Infl Factor	Infl Factor	Eff Tax Rate			from total income to target		
bonus % w/bonus		0.00 %			0.00 %	Jane inc	0		2.00 %	2.00 %						
2025	65	787,500	0	1,312,500	0	2,100,000	0	100,000	0	(13,700)-14%	86,300	85,000	1,300	2025		
2026	66	826,875	0	1,378,125	0	2,205,000	0	102,000	0	(13,974)-14%	88,026	86,700	1,326	2026		
2027	67	779,255	88,963	1,447,031	0	2,226,286	88,963	0	0	(529)-6%	88,434	88,434	0	2027		
2028	68	727,193	91,025	1,519,382	0	2,246,576	91,025	0	0	(822)-6%	90,203	90,203	0	2028		
2029	69	670,431	93,122	1,595,352	0	2,265,782	93,122	0	0	(1,115)-6%	92,007	92,007	0	2029		
2030	70	642,412	61,540	1,675,119	0	2,317,532	61,540	0	34,911	(2,604)-5%	93,847	93,847	0	2030		
2031	71	611,626	62,906	1,758,875	0	2,370,502	62,906	0	35,609	(2,792)-5%	95,724	95,724	0	2031		
2032	72	577,911	64,297	1,846,818	0	2,424,730	64,297	0	36,321	(2,980)-5%	97,638	97,638	0	2032		
2033	73	541,094	65,712	1,939,159	0	2,480,254	65,712	0	37,048	(3,169)-5%	99,591	99,591	0	2033		
2034	74	500,996	67,153	2,036,117	0	2,537,113	67,153	0	37,789	(3,359)-5%	101,583	101,583	0	2034		
2035	75	526,046	0	2,055,154	82,769	2,581,200	82,769	0	38,545	(4,702)-12%	116,611	103,615	12,997	2035		
2036	76	552,348	0	2,071,196	86,715	2,623,544	86,715	0	39,315	(4,796)-12%	121,234	105,687	15,548	2036		
2037	77	579,965	0	2,084,310	90,445	2,664,276	90,445	0	40,102	(4,892)-12%	125,655	107,801	17,854	2037		
2038	78	608,964	0	2,093,785	94,741	2,702,748	94,741	0	40,904	(4,990)-12%	130,655	109,957	20,698	2038		
2039	79	639,412	0	2,099,242	99,232	2,738,654	99,232	0	41,722	(5,090)-12%	135,863	112,156	23,708	2039		
2040	80	671,382	0	2,100,281	103,923	2,771,664	103,923	0	42,556	(5,192)-12%	141,287	114,399	26,889	2040		
2041	81	704,951	0	2,097,033	108,262	2,801,985	108,262	0	43,407	(5,296)-12%	146,374	116,687	29,687	2041		
2042	82	740,199	0	2,088,532	113,353	2,828,731	113,353	0	44,276	(5,402)-12%	152,227	119,021	33,207	2042		
2043	83	777,209	0	2,074,962	117,996	2,852,171	117,996	0	45,161	(5,510)-12%	157,648	121,401	36,247	2043		
2044	84	816,069	0	2,055,201	123,510	2,871,270	123,510	0	46,064	(5,620)-12%	163,954	123,829	40,125	2044		
				594,719	1,020,946		1,615,665		202,000	603,730	(96,535)	2,324,860	2,065,276	259,584		

Step 2: Edit: Click on the green edit button underneath the Cash Flow and Tax Advisor heading.

Cashflow and Tax Advisor

Link Save Cancel **Condense** Hide Tax Advisor Add Scenario Calculate

Tax Filing

	2025 (PROV)	2027 (PROV)	2030 (PROV)	2035 (PROV)
Income	Cash Flow	Tax Return	Cash Flow	Tax Return
1 Wages	100,000	100,000		
2a Tax Exempt Int				
2b Taxable Interest				
2c Qualified Dividends				
3a All Dividends				
4 Client 1 Distributions				82,769
4 Client 2 Distributions				82,769
4 Other				
4 Client1 Pension				
4 Client2 Pension				
4 Other				
4 Roth Conversion				
4a Client1 Social Security			34,911	38,545
4a Client2 Social Security				
4a Total Social Security			34,911	38,545
7 Short Term Cap Gains		39,575	5,804	5,804
7 Long Term Cap Gains		50,000	60,000	
81 Self Employ Biz - QBI				
81 Self Employ Biz - not QBI				
81 Sch E (no SE Tax) - QBI				
81 Sch E (no SE Tax) - not QBI				
81 All Other Schedule 1 Income				
81 SE Tax Deduction				
81 All Other Adj to Income				
Income Total \$	100,000	89,575	100,715	121,314
Expenses				
Medical Expenses (7.5%)				
Property & State Taxes				
Mortgage Interest				
Charities				
All other Schedule A				
Mortgage - Rent				
Home Insurance				
Utilities				
Phone - Cable				
Maint - Landscaping				
Cars				
Car Insurance				
Car gas and maintenance				
Boat - RV				
Life Insurance				
Food and Groceries				
Clothes - Home goods				
Entertainment - Meals				
Travel - Hobbies				
Credit Cards				
Savings				
Other Expenses				
Income Taxes				
Expenses Total \$				
Income Taxes				
Standard Deduction	14,881	17,501	18,506	20,311
12 Largest Ded - Sched A or Std	14,881	17,501	18,506	20,311
13 Qual Biz Income Deduction		50,000	60,000	
Cap Gains and Qual Dividends		72,074	76,972	95,221
15 TAXABLE INCOME	85,119	72,074	76,972	95,221
19 Enter Tax Credits				
23 Self Employment Taxes				
24 Approximate Tax Calc	13,683	5,723	5,388	14,840
Approximate State Tax Calc	%	%	%	%
Discretionary Income \$	86,317	83,852	95,327	106,474
Used on "Print 1040" Form Only				
264 Tax Payments Withheld				
52 All other tax credits				
52 Estimated Tax Payments				
54 Total Payments				
54 Refund				
57 Amount you owe	13,683	5,723	5,388	14,840

Step 4: Condense View: The income, expenses, and income taxes should automatically be condensed and changed on the screen.

Cashflow and Tax Advisor

Edit
Save
Cancel
Uncondense
Hide Tax Advisor
Add Scenario
Calculate

Tax Filing

Income

1 Wages

4 Client 1 Distributions

6a Client1 Social Security

6b Total Social Security

7 Short Term Cap Gains

7 Long Term Cap Gains

11 Income Total \$

Expenses

Expenses Total \$

Income Taxes

Standard Deduction

12 Largest Ded - Schd A or Std

Cap Gains and Qual Dividnds

15 TAXABLE INCOME

24 Approximate Tax Calc

Discretionary Income \$

Used on "Print 1040" Form Only

37 Amount you owe

Jane	2025 (PROV)	Jane	2027 (PROV)	Jane	2030 (PROV)	Jane	2035 (PROV)
Working		Early Retirement		Social Security		SS & Roth Withdraws	
Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
100,000	100,000						
						82,769	82,769
				34,911		38,545	
				34,911	29,674	38,545	32,763
					85 % SS Taxable		85 % SS Taxable
		39,575	39,575	5,804	5,804		
		50,000	50,000	60,000	60,000		
100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,532
overrides		overrides		overrides		overrides	
	14,881		17,501		18,506		20,311
	14,881		17,501		18,506		20,311
			50,000		60,000		
	85,119		72,074		76,972		95,221
	22 % Tax Bracket 13.7 % Eff Tax Rate		12 % Tax Bracket 6.4 % Eff Tax Rate		12 % Tax Bracket 5.3 % Eff Tax Rate		22 % Tax Bracket 12.2 % Eff Tax Rate
	13,683		5,723		5,388		14,840
86,317		83,852		95,327		106,474	
	13,683		5,723		5,388		14,840
	Print 1040		Print 1040		Print 1040		Print 1040

Step 5: Uncondense: Click on the green uncondense button underneath the Cash Flow and Tax Advisor heading.

Cashflow and Tax Advisor

Edit
Save
Cancel
Uncondense
Hide Tax Advisor
Add Scenario
Calculate

Tax Filing

Income

1 Wages

4 Client 1 Distributions

6a Client1 Social Security

6b Total Social Security

7 Short Term Cap Gains

7 Long Term Cap Gains

11 Income Total \$

Expenses

Expenses Total \$

Income Taxes

Standard Deduction

12 Largest Ded - Schd A or Std

Cap Gains and Qual Dividnds

15 TAXABLE INCOME

24 Approximate Tax Calc

Discretionary Income \$

Used on "Print 1040" Form Only

37 Amount you owe

Jane	2025 (PROV)	Jane	2027 (PROV)	Jane	2030 (PROV)	Jane	2035 (PROV)
Working		Early Retirement		Social Security		SS & Roth Withdraws	
Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
100,000	100,000						
						82,769	82,769
				34,911		38,545	
				34,911	29,674	38,545	32,763
					85 % SS Taxable		85 % SS Taxable
		39,575	39,575	5,804	5,804		
		50,000	50,000	60,000	60,000		
100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,532
overrides		overrides		overrides		overrides	
	14,881		17,501		18,506		20,311
	14,881		17,501		18,506		20,311
			50,000		60,000		
	85,119		72,074		76,972		95,221
	22 % Tax Bracket 13.7 % Eff Tax Rate		12 % Tax Bracket 6.4 % Eff Tax Rate		12 % Tax Bracket 5.3 % Eff Tax Rate		22 % Tax Bracket 12.2 % Eff Tax Rate
	13,683		5,723		5,388		14,840
86,317		83,852		95,327		106,474	
	13,683		5,723		5,388		14,840
	Print 1040		Print 1040		Print 1040		Print 1040

Step 6: Uncondense View: The screen should automatically go back to its original view of the cash flow and tax advisor.

Cashflow and Tax Advisor

File Save Cancel Condense Hide Tax Advisor Add Scenario Calculate

Tax Filing

	2025 (PROV)	2027 (PROV)	2030 (PROV)	2035 (PROV)
	Working	Early Retirement	Social Security	SS & Roth Withdraws
	Cash Flow	Tax Return	Cash Flow	Tax Return
Income				
1 Wages	100,000	100,000		
29 Tax Exempt Int				
30 Taxable Interest				
31 Qualified Dividends				
4 All Dividends				
4 Client 1 Distributions				82,769
4 Client 2 Distributions				
4 Other				
4 Client1 Pension				
4 Client2 Pension				
4 Other				
4 Roth Conversion				
64 Client1 Social Security			34,911	38,545
64 Client2 Social Security				
65 Total Social Security			34,911	38,545
7 Short Term Cap Gains		39,575	5,804	
7 Long Term Cap Gains		50,000	60,000	
51 Self Employ Biz - QBI				
51 Self Employ Biz - not QBI				
51 Sch E (no SE Tax) - QBI				
51 Sch E (no SE Tax) - not QBI				
51 All Other Schedule 1 Income				
51 SE Tax Deduction				
51 All Other Adj to Income				
11 Income Total \$	100,000	89,575	100,715	121,314
Expenses				
Medical Expenses (7.5%)				
Property & State Taxes				
Mortgage Interest				
Charities				
All other Schedule A				
Mortgage - Rent				
Home Insurance				
Utilities				
Phone - Cable				
Maint - Landscaping				
Cars				
Car Insurance				
Car gas and maintenance				
Boat - RV				
Life Insurance				
Food and Grocery				
Clothes - Home goods				
Entertainment - Meals				
Travel - Hobbies				
Credit Cards				
Savings				
Other Expenses				
Income Taxes				
Expenses Total \$				
Income Taxes				
Standard Deduction	overrides	overrides	overrides	overrides
12 Largest Ded - Sched A or Std	14,881	17,501	18,506	20,311
13 Qual Biz Income Deduction				
Cap Gains and Qual Dividends		50,000	60,000	
15 TAXABLE INCOME	85,119	72,074	76,972	95,221
19 Enter Tax Credits				
23 Self Employment Taxes				
24 Approximate Tax Calc	22 % Tax Bracket 13.7 % Off Tax Rate	12 % Tax Bracket 6.4 % Off Tax Rate	12 % Tax Bracket 5.9 % Off Tax Rate	22 % Tax Bracket 12.2 % Off Tax Rate
Approximate State Tax Calc	13,683	5,723	5,388	14,840
Discretionary Income	86,317	83,852	95,327	106,474
Used on "Print 1040" Form Only				
354 Tax Payments Withheld				
32 All other tax credits				
32 Estimated Tax Payments				
33 Total Payments				
34 Refund				
37 Amount you owe	13,683	5,723	5,388	14,840

Step 7: Save: Click on the green save button underneath the Cash Flow and Tax Advisor heading.

Cashflow and Tax Advisor

Save Cancel Condense Hide Tax Advisor Add Scenario Calculate

Tax Filing: 2025 (PROV) 2027 (PROV) 2030 (PROV) 2035 (PROV)

	Working	Early Retirement	Social Security	SS & Roth Withdraws
	Cash Flow	Tax Return	Cash Flow	Tax Return
Income				
1 Wages	100,000	100,000		
2a Tax exempt Int				
2b Taxable Interest				
3a Qualified Dividends				
3b All Dividends				
4 Client 1 Distributions				82,769
4 Client 2 Distributions				
4 Other				
4 Client 1 Pension				
4 Client 2 Pension				
4 Other				
4 Roth Conversion				
6a Client 1 Social Security			34,911	38,545
6a Client 2 Social Security			34,911	38,545
6a Total Social Security			69,822	77,090
7 Short Term Cap Gains		39,575	39,575	5,804
7 Long Term Cap Gains		50,000	50,000	60,000
81 Self Employ Biz - QBI				
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Expenses				
Medical Expenses (7.5%)				
Property & State Taxes				
Mortgage Interest				
Charities				
All other Schedule A				
Mortgage - Rent				
Home Insurance				
Utilities				
Phone - Cable				
Maint - Landscaping				
Cars				
Car Insurance				
Car gas and maintenance				
Boat - RV				
Life Insurance				
Food and Groceries				
Clothes - Home goods				
Entertainment - Meals				
Travel - Hobbies				
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Savings				
Other Expenses				
Income Taxes				
Expenses Total \$				
Income Taxes				
Standard Deduction	14,881	17,501	18,506	20,311
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Cap Gains and Qual Dividends		50,000	60,000	
15 TAXABLE INCOME	85,119	72,074	76,972	95,221
19 Enter Tax Credits				
23 Self Employment Taxes				
24 Approximate Tax Calc	13,683	5,723	5,388	14,840
Approximate State Tax Calc				
Discretionary Income \$	86,317	83,852	95,327	106,474
Used on "Print 1040" Form Only				
264 Tax Payments Withheld				
82 All other tax credits				
82 Estimated Tax Payments				
84 Refund				
87 Amount you owe	13,683	5,723	5,388	14,840

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: support@planscout.com.