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

02/14/2025 10:19 am EST

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 DASHBOA	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS REF	PORTS TO	IOLS		
	Structured Income Planning Edit Dynamic Mode													
Scenario Condense and Uncondense Feature														
	20 years 🗸	Non	Dualified		RA									
Horizon		Non-C	Juaimed		KA									
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 initial amount bonus %	64	5.00 % 750,000 0.00 %		5.00 % 1,250,000 0.00 %	Jalie IRA Jane inc	2,000,000	Subtotal of account	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	from total	
w/bonus		750,000		1,250,000		2,000,000	incomes	2.00 %	2.00 %	LIT Tax Nate		2.00 %	target	
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 2029	68 69	727,193 670,431	91,025 93,122	1,519,382 1,595,352	0	2,246,576 2,265,782	91,025 93,122	0	0	(822)-6% (1,115)-6%	90,203 92,007	90,203 92,007	0	2028 2029
2029	70	642,412	61,540	1,675,119	0	2,205,782	61,540	0	34,911	(2,604)-5%	92,007	92,007	0	2029
2030	70	611,626	62,906	1,758,875	0	2,370,502	62,906	Ő	35,609	(2,792)-5%	95,724	95,724	ő	2030
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 2040	79 80	639,412 671,382	0	2,099,242 2,100,281	99,232 103,923	2,738,654 2,771,664	99,232 103,923	0	41,722 42,556	(5,090)-12% (5,192)-12%	135,863 141,287	112,156 114,399	23,708 26,889	2039 2040
2040	80	704,951	0	2,100,281	103,923	2,771,664	103,923	0	42,556	(5,192)-12%	141,287	114,399	29,687	2040
2041	82	740,199	0	2,097,033	113,353	2,828,731	113,353	0	44,276	(5,402)-12%	152,227	119,021	33,207	2041
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.

Tax		Jane v 2025 (PR04 v Working		27 (PROV ~	Jane 2 Social Se Cash Flow 1	1030 (PRO% ~	Jane v 2035 (PROV V SS & Roth Withdraws	
Income	Cash Flow	Tax Return	Cash Flow T		Cash Flow 1	Tax Return	Cash Flow	
Wages	100,000	100,000						
Tax Exempt Int Taxable Interest								
Qualified Dividends				_	-	_	-	_
All Dividends	_			_				_
Client 1 Distributions							82,769	82,70
Client 2 Distributions								
Other								
Client1 Pension					2			
Client2 Pension								
Other		-			1			
Roth Conversion					-			
Client1 Social Security Client2 Social Security					34,911		38,545	
Total Social Security	-		-		34,911	29,674	38,545	32,7
Total Gooda Geografy					34,911	85 % SS Taxable	38,945	85 % 55 Taxa
Short Term Cap Gains		1	39,575	39,575	5,804	5,804	1	
Long Term Cap Gains			50,000	50,000	60,000	60,000		
Self Employ Biz - QBI								
Self Employ Biz - not QB Sch E (no SE Tax) - QBI		-						
Sch E (no SE Tax) - QBI Sch E (no SE Tax) - not (VPI		1					
All Other Schedule 1 Ino	me							
SE Tax Deduction			-		-		in the second se	
All Other Adjt to Income	and correct							
Income	Total \$ 100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,53
Expenses								
Medical Expenses (7.5%				1			1	
Property & State Taxes			3 <u>2 - 1</u> 2 2					
Mortgage Interest								
Charities All other Schedule A								
Mortgage - Rent				-				
Home Insurance								
Utilities			-				-	
Phone - Cable					-			
Maint - Landscaping							Concession of the	
Cars								
Car Insurance								
Car gas and maintenanc								
Boat - RV								
Life Insurance								
Food and Grocery Clothes - Home goods								
Entertainment - Meals					-			
Travel - Hobbies			-		-			
Credit Cards					1		-	
Savings					-			
Other Expenses					1			
Income Taxes								
Expenses	Total \$							
Income Taxes Standard Deduction	overrides	14,881	overrides	17,501	overrides	18,506	ovenides	20.3
Largest Ded - Schd A or	and the	14,881	-	17,501	-	18,506	-	20.3
Qual Biz Income Deduct		140401		11,001		10,000		2003
Cap Gains and Qual Divi			-	50,000	-	60,000	Concession of the local division of the loca	
TAXABLE INCOME		85,119		72,074		76,972		95,2
Enter Tax Credits			1		1		1	
Self Employment Taxes			E The		1			
	22 % Tax Bracket		12 % Tax Bracket		12 % Tax Bracket		22 % Tax Bracket	
Approximate Tax Calc	alc %	13,683		5,723		5,388		14.8
Approximate State Tax C			00.050		OF DOT		104 174	
Discretionary In	come \$ 86,317		83,852		95,327		106,474	
Used on "Print 1040"	Form Only							
Tax Payments Withheld	Sin Sing							
All other tax credits			-		-			
Estimated Tax Payments					-			
Total Payments								
Refund Amount you owe		13,683		5,723		5,388		14.8

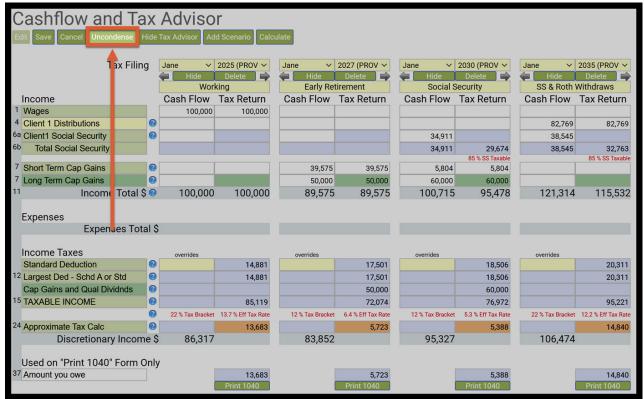
Step 3: Condense: Click on the green condense button underneath the Cash Flow and Tax Advisor heading.

Cashflow and			cenario Calcula						
1	ax Filing	Jane 🗸	2025 (PROV ~ Delete	Jane v	2027 (PROV ~ Delete	Jane V Hide Social S	2030 (PROV ~ Delete	Jane v	2035 (PROV -
Income		Work Cash Flow	Tax Return	Early Ret Cash Flow	Tax Return	Social S Cash Flow	Security Tax Return	SS & Roth Cash Flow	munemo
1 Wages		100,000	100,000						
Tax Exempt Int	0	2							Č.
Taxable Interest Qualified Dividends			_			-			
All Dividends					_				
4 Client 1 Distributions	0							82,769	82,76
4 Client 2 Distributions 4 Other									
4 Client1 Pension	_								
4 Client2 Pension									
4 Other									
Roth Conversion									
Client1 Social Security		-		-		34,911		38,545	
b Total Social Security					_	34,911	29,674	38,545	32,76
7 Short Term Cap Gains				39,575	39.575	5,804	85 % 55 Taxable 5.804		85 % 55 Taxat
7 Long Term Cap Gains		12			50,000	60,000	00000	-	
S1 Self Employ Biz - QBI	0			10000000000000000000000000000000000000	120000	1			
Self Employ Biz - not QE		1		1		-	3		
⁵¹ Sch E (no SE Tax) - QBI ⁵¹ Sch E (no SE Tax) - not									
All Other Schedule 1 Inc									
S1 SE Tax Deduction	0			1		1			
All Other Adjt to Income		0							
Income	Total \$ 9	100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,53
Mortgage Interest Charties All other Schedule A Mortgage - Rent Home Insurance Utilies Phone - Cable Maint - Landscaping Car Insurance Car Insurance Car gas and maintenain Boat - RV Utile Insurance Food and Grocery Cothes - Home pools Eintertainment - Meals Crothic Cards Savings Other Expenses Income Taxes									
Expen	ves rotar a								
Income Taxes	0	overrides	14,681	ovenides		overrides	18.506	overrides	20.31
Standard Deduction 2 Largest Ded - Schd A or			14,881		17,501		18,506		20,31 20,31
13 Qual Biz Income Deduct	ion 9			S 5					2.0,0 1
Cap Gains and Qual Div					50,000		60,000		
TAXABLE INCOME Enter Tax Credits	•		85,119	-	72,074	1	76,972		95,22
23 Self Employment Taxes				-					
		22 % Tax Bracket	13.7 % Eff Tax Rate	12 % Tax Bracket	6.4 % Eff Tax Rate		5.3 % Of Tax Rate	22 % Tax Bracket	1223-07 Tex R
Approximate Tax Calc Approximate State Tax C	alo e		13,683		5,723		5,368		14,84
Discretionary Used on "Print 1040" 54 Tax Payments Withheld 12 All other tax credits 24 Estimated Tax Payments 13 Total Payments	Form Only	86,317		83,852		95,327		106,474	
14 Refund									
7 Amount you owe			13,683		5,723		5,388		14,8

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

Cashflow and Tax Edit Save Cancel Uncondense Hide			ulate					
Tax Filing	Jane 🗸	2025 (PROV ~	Jane 🗸	2027 (PROV 🗸	Jane 🗸	2030 (PROV 🗸	Jane 🗸	2035 (PROV 🗸
			두 Hide Delete 🛋		🖨 🛛 Hide	Delete 📄	🖨 Hide Delete	
	Working			Early Retirement		Security	SS & Roth Withdraws	
Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1 Wages	100,000	100,000						
4 Client 1 Distributions							82,769	82,769
6a Client1 Social Security					34,911		38,545	
6b Total Social Security					34,911	29,674 85 % SS Taxable	38,545	32,763 85 % SS Taxable
7 Short Term Cap Gains			39.575	39,575	5.804	5.804		65 % SS Taxable
⁷ Long Term Cap Gains			50,000	50.000	60,000	60,000		
¹¹ Income Total \$ @	100.000	100,000	89.575	89,575	100,715	95.478	121,314	115,532
Expenses Expenses Total S								_
Income Taxes	overrides		overrides		overrides		overrides	
Standard Deduction 2		14,881		17,501		18,506		20,311
12 Largest Ded - Schd A or Std		14,881		17,501		18,506		20,311
Cap Gains and Qual Dividnds				50,000		60,000		
15 TAXABLE INCOME		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
24 Approximate Tax Calc		13,683		5,723		5,388		14,840
Discretionary Income S	86,317		83,852		95,327		106,474	
Used on "Print 1040" Form Onl ³⁷ Amount you owe		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 Adivsor heading.



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

Cashflow and Ta		r icenario Calcula						
Tax Filin	Hide	2025 (PROV ~ Delete	Jane V	2027 (PROV ~ Dolcte	Jane v Gal Hide	2030 (PROV ~ Delete	Jane V	2035 (PROV
Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	
1 Wages Tax Exempt Int	100,000	100,000						
Taxable Interest							-	-
a Qualified Dividends	6							
All Dividends	9						82,769	82,76
4 Client 1 Distributions 4 Client 2 Distributions	1				-		82,769	82,76
4 Other						-		
4 Client1 Pension								
4 Client2 Pension 4 Other			-					-
Roth Conversion	1	-	-		1	-		-
A Client1 Social Security	9	1			34,911	1	38,545	
a Client2 Social Security								
b Total Social Security					34,911	29,674	38,545	32,76
7 Short Term Cap Gains	6	12	39,575		5,804	5.804		
7 Long Term Cap Gains	9	92	50,000	50,000	60,000	60,000		
³¹ Self Employ Biz - QBI ³¹ Self Employ Biz - not QBI	6		-		-		-	
1 Sch E (no SE Tax) - QBI	G							
1 Sch E (no SE Tax) - not QBI	9							
All Other Schedule 1 Income	6		-					
31 SE Tax Deduction 31 All Other Adjt to Income	6							
Income Total \$	100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,53
Medical Expenses (7.5%) Property & State Taxes Mortgage Interest Charities Charities Charities Phone - Casile Maint - Landscaping Car Insurance Car ges and maintenance Boart - RV Life Insurance Food and Grocery Codes - Hone goods Travel - Hobbies Careli Cards Savings Other Expenses Income Taxes								
Expenses Tota	al t							
Income Taxes	overides		overrides		overrides		overrides	
Standard Deduction	6	14,881		17,501	A SHOULD BE	18,506		20,31
2 Largest Ded - Schd A or Std 3 Qual Biz Income Deduction	6	14,881		17,501		18,506		20,31
Cap Gains and Qual Dividinds	G			50,000		60,000		
5 TAXABLE INCOME	6	85,119		72,074		76,972		95,2
9 Enter Tax Credits		1			5		N	
3 Self Employment Taxes	6	13.7 % DY Tax Rate		6.4.5 Eff Tax Rate	1.	5.3 % DY Tax Rate	22.5	12.2 N EH Tau R
Approximate Tax Calc	0		12 % Tax Bracket	6.4 % En Tax Rate 5,723		5.3 % (rt fax Rote 5,388	22 % Tax Bracket	122 101144
Approximate State Tax Calc	G	14,483		0.723				
Discretionary Incom Used on "Print 1040" Form O Mark Tax Payments Withheld All other tax credits Estimated Tax Payments 3 Total Payments			83,852		95,327		106,474	
4 Refund 7 Amount you owe		13,683 Prior 1040		5,723 Print 1940		5,388 Prior 1040		14,8

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

the second se									
Tax Fi	ling	Jane 🗸	2025 (PROV V		2027 (PROV ~	Jane V Hister Social S	2030 (PROV ~	Jane 🗸	2035 (PROV -
		Wor	king	Early Ret	irement	Social S	lecurity	SS & Roth	
Income		Cash Flow 100,000	Tax Return 100,000	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1 Wag zs 2a Tax exempt Int		100,000	100,000						-
2b Taxa ple Interest		-						17	
3a Qua fied Dividends	0								
36 All E vidends	0	1		-					
4 Clie 11 Distributions 4 Clie 12 Distributions	- *					(<u>-</u>		82,769	82,76
4 Other									
4 Clie 11 Pension									
4 Clie 12 Pension									
4 Other						1		1	
4 Rott Conversion 69 Client1 Social Security				-		34,911		38,545	
6a Client2 Social Security	- 1							00,045	
6b Total Social Security				1		34,911	29,674	38,545	32,76 85 % 55 Tana
7 Short Term Cap Gains				39,575	39,575	5.804	85% 55 Taxable 5,804		85 % 55 Tana
7 Long Term Cap Gains			1		50,000	60,000	60,000	1	-
S1 Self Employ Biz - QBI							A STREET		
S1 Self Employ Biz - not QBI				-		1		1	
S1 Sch E (no SE Tax) - QBI S1 Sch E (no SE Tax) - not QBI	0								
S1 All Other Schedule 1 Income	-			-		-			
S1 SE Tax Deduction						1		-	
S1 All Other Adjt to Income	0								
11 Income Tota	1\$9	100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,53
Expenses									
Medical Expenses (7.5%)								1	
Property & State Taxes									
Mortgage Interest									
Charities All other Schedule A									
Mortgage - Rent				-					
Home Insurance									
Utilities									
Phone - Cable								-	
Maint - Landscaping Cars	- 3			-					
Car Insurance	-			-		1 1			
Car gas and maintenance				1				121	
Boat - RV									
Life insurance									
Food and Grocery Clothes - Home goods									
Entertainment - Meals				-					
Travel - Hobbies								-	
Credit Cards									
Savings				1				1	
Other Expenses Income Taxes				-					
Expenses T	otal \$								
Income Taxes Standard Deduction		overrides	14.881	overrides	17.501	overrides	18.506	overrides	20.31
12 Largest Ded - Schd A or Std			14,881	-	17,501	1	18,506	1	20,31
13 Qual Biz Income Deduction	0			2		S 2		1	
Cap Gains and Qual Dividnds					\$0,000		60,000		
15 TAXABLE INCOME 19 Enter Tax Credits	•		85,119	-	72,074	-	76,972		95,22
23 Self Employment Taxes						10 × 1			
and any of the lates		22 % Tax Bracket	13.7 % Eff Tax Rate	12 % Tax Bracket	6.4 % EV Tax Rate	12 % Tax Bracket	5.3 % Of Tax Rate		12.2 % EV Tex R
24 Approximate Tax Calc	0		13,683		5,723		5,388		14,84
Approximate State Tax Calc	0								
Discretionary Inco	ome \$	86,317		83,852		95,327		106,474	
Used on "Print 1040" Form	n Only								
25d Tax Payments Withheld									
32 All other tax credits	1		ц ;						
32 Estimated Tax Payments 33 Total Payments									
34 Refund	-								
			13,683		5,723		5,388		14,84
37 Amount you owe									

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.