

Hide/Unhide Feature on the Cash Flow and Tax Advisor Page

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On the Cash Flow and Tax Advisor page, you can hide or unhide the tax return column. This feature would be used if an advisor is creating different tax scenarios and want to control which ones are visible in SIPS and on the printed SIPS report. Any "hidden" scenario would be excluded from the report. Below are the step-by-step guidelines for the Hide and Unhide Tax Advisor feature.

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](#)

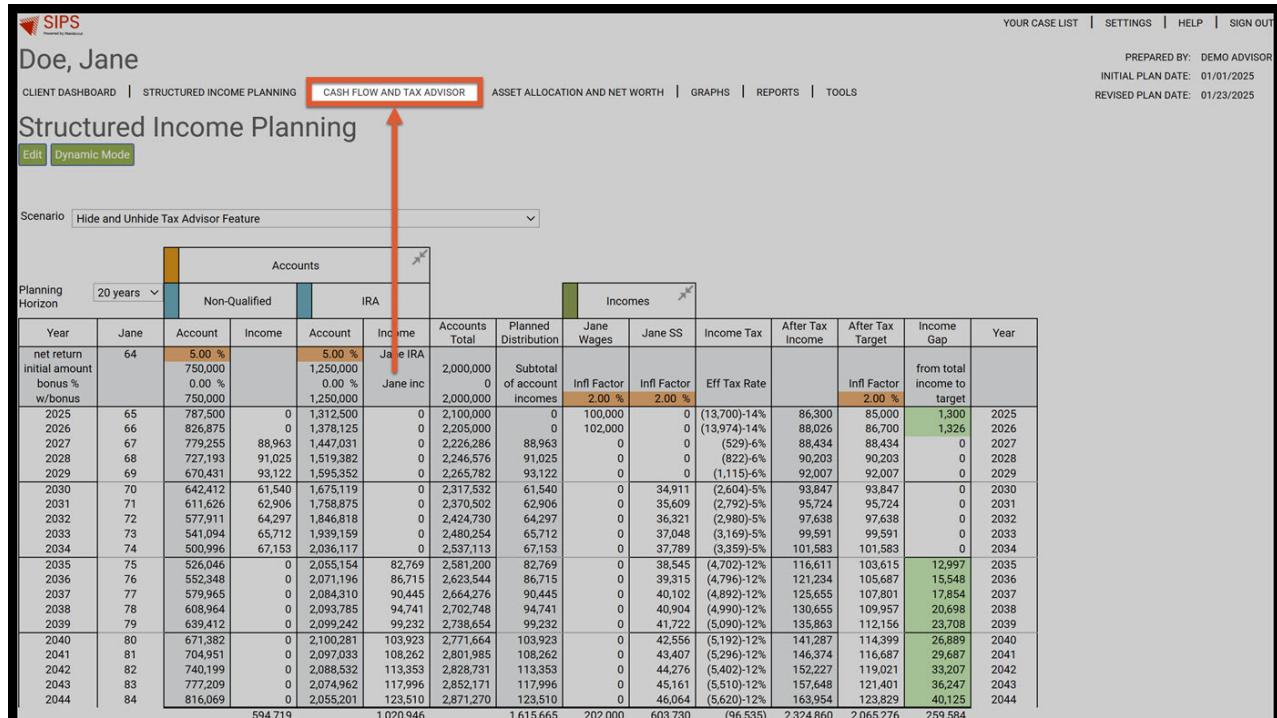
To learn more about the Cash Flow and Tax Advisor individual column features see articles:

- [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 Clients Name.



The screenshot shows the SIPS software interface. At the top, there is a navigation bar with links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar, it says 'PREPARED BY: DEMO ADVISOR', 'INITIAL PLAN DATE: 01/01/2025', and 'REVISED PLAN DATE: 01/23/2025'. The main content area is titled 'Structured Income Planning'. At the top of this section, there are buttons for 'Edit' and 'Dynamic Mode'. Below this, there is a dropdown menu for 'Scenario' with an option 'Hide and Unhide Tax Advisor Feature'. A red arrow points from the text 'Click on the Cash Flow and Tax Advisor heading underneath the Clients Name.' to the 'CASH FLOW AND TAX ADVISOR' tab, which is highlighted with a red box. The table below shows 'Accounts' and 'Incomes' over a 20-year planning horizon, with columns for Year, Jane, Account, Income, and various tax and investment metrics.

Year	Jane	Accounts		Incomes		Income Tax	After Tax Income	After Tax Target	Income Gap	Year			
		Account	Income	Account	Income								
2025	65	0	2,100,000	0	100,000	0	(13,700)-14%	86,300	85,000	1,300	2025		
2026	66	826,875	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	88,434	88,434	0	2027	
2028	68	727,193	91,025	1,519,382	0	2,246,576	91,025	0	90,203	90,203	0	2028	
2029	69	670,431	93,122	1,595,352	0	2,265,782	93,122	0	92,007	92,007	0	2029	
2030	70	642,412	61,540	1,675,119	0	2,317,532	61,540	0	93,847	93,847	0	2030	
2031	71	611,626	62,906	1,758,875	0	2,370,502	62,906	0	95,724	95,724	0	2031	
2032	72	577,911	64,297	1,846,818	0	2,424,730	64,297	0	97,638	97,638	0	2032	
2033	73	541,094	65,712	1,939,159	0	2,480,254	65,712	0	99,591	99,591	0	2033	
2034	74	500,996	67,153	2,036,117	0	2,537,113	67,153	0	101,583	101,583	0	2034	
2035	75	526,046	0	2,055,154	82,766	82,769	0	88,545 (4,702)-12%	116,611	103,615	12,997	2035	
2036	76	552,348	0	2,071,196	86,715	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	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	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	2,097,038	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

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

Cashflow and Tax Advisor									
Tax Filing		Jane 2025 (PRO)		Jane 2027 (PRO)		Jane 2030 (PRO)		Jane 2035 (PRO)	
Working		Early Retirement		Social Security		SS & Roth Withdraws			
Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
Income									
1 Wages	100,000	100,000							
2 Tax Exempt Int									
3 Taxable Interest									
3a Qualified Dividends									
3 All Dividends									
4 Client 1 Distributions									
4 Client 2 Distributions									
4 Other									
5 Client1 Pension									
5 Client2 Pension									
5 Other									
6 Roth Conversion									
6a Client1 Social Security						34,911		38,545	
6a Client2 Social Security						34,911	29,674	38,545	32,763
6b Total Social Security						34,911	29,674	38,545	32,763
6b 85 % SS Taxable						85 % SS Taxable	85 % SS Taxable	85 % SS Taxable	85 % SS Taxable
7 Short Term Cap Gains				39,575	39,575	5,804	5,804		
7 Long Term Cap Gains				50,000	50,000	60,000	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	100,000	89,575	89,575	100,715	95,478	121,314	115,532	
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	14,881	overrides	17,501	overrides	18,506	overrides	20,311	
12 Largest Ded - Schd A or Std	14,881		17,501		18,506		20,311		
13 Qual Biz Income Deduction									
14 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	13,683	12 % Tax Bracket	5,723	12 % Tax Bracket	5,388	22 % Tax Bracket	14,840	
Approximate State Tax Calc	%		%		%		%		
Discretionary Income \$	86,317		83,852		95,327		106,474		
Used on "Print 1040" Form Only									
25d 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		
	Print 1040		Print 1040		Print 1040		Print 1040		

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 01/23/2025

Doe, Jane

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

Cashflow and Tax Advisor

Edit Save Cancel Uncondense Hide Tax Advisor Add Scenario Calculate

Tax Filing: Jane, 2025 (PROV) Working

Income: 1 Wages (100,000), 2a Tax Exempt Int, 2b Taxable Interest, 3a Qualified Dividends, 3b All Dividends, 4 Client 1 Distributions, 4 Client 2 Distributions, 4 Other, 4 Client1 Pension, 4 Client2 Pension, 4 Other, 4 Roth Conversion, 6a Client1 Social Security, 6a Client2 Social Security, 6b Total Social Security

Cash Flow: 100,000

Tax Return: 100,000

Tax Filing: Jane, 2027 (PROV) Early Retirement

Cash Flow: 89,575

Tax Return: 89,575

Tax Filing: Jane, 2030 (PROV) Social Security

Cash Flow: 100,715

Tax Return: 95,478

Tax Filing: Jane, 2035 (PROV) SS & Roth Withdraws

Cash Flow: 121,314

Tax Return: 115,532

Hide Tax Advisor button highlighted with a red box and arrow.

Step 4: Cash Flow View: SIPS will automatically hide the tax return column, the only column that should be showing is the cash flow.

Cashflow and Tax Advisor

Buttons: Edit, Save, Cancel, Uncollapse, Use Tax Advisor, Add Scenario, Calculate (highlighted with a red arrow)

Tax Filing

	Jane	Jane	Jane	Jane
	Hide Delete	Hide Delete	Hide Delete	Hide Delete
	Working	Early Retirement	Social Security	SS & Roth Withdrawals
	Cash Flow	Cash Flow	Cash Flow	Cash Flow
1 Wages	100,000			82,769
2b Taxable Interest				
3b All Dividends				
4 Client 1 Distributions				
4 Client 2 Distributions				
4 Other				
4 Client1 Pension				
4 Client2 Pension				
4 Other				
4 Roth Conversion				
6a Client1 Social Security			34,911	38,545
6a Client2 Social Security			34,911	38,545
6b Total Social Security			34,911	38,545
11 Income Total \$	100,000		34,911	121,314

Income

1 Wages
2b Taxable Interest
3b All Dividends
4 Client 1 Distributions
4 Client 2 Distributions
4 Other
4 Client1 Pension
4 Client2 Pension
4 Other
4 Roth Conversion
6a Client1 Social Security
6a Client2 Social Security
6b Total Social Security
11 Income Total \$

Expenses

Medical Expenses (7.5%)
Property & State Taxes
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 \$	Discretionary Income \$
	100,000	34,911
		121,314

Step 5: Use Tax Advisor: Click on the green Use Tax Advisor button underneath the Cash Flow and Tax Advisor heading to go back to the cash flow and tax advisor orginal view.

Cashflow and Tax Advisor

Buttons: Edit, Save, Cancel, Uncondense, **Use Tax Advisor** (highlighted with a red box and arrow), Add Scenario, Calculate

Tax Filing

	Working	Early Retirement	Social Security	SS & Roth Withdrawal
1 Wages	100,000			82,769
2b Taxable Interest				
3b All Dividends				
4 Client 1 Distributions				
4 Client 2 Distributions				
4 Other				
4 Client1 Pension				
4 Client2 Pension				
4 Other				
4 Roth Conversion				
6a Client1 Social Security			34,911	38,545
6a Client2 Social Security				
6b Total Social Security			34,911	38,545
11 Income Total \$	100,000		34,911	121,314

Expenses

Medical Expenses (7.5%)				
Property & State Taxes				
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 \$				
Discretionary Income \$	100,000		34,911	121,314

Step 6: Cash Flow and Tax Return View: The screen should automatically go back to its original view.

Cashflow and Tax Advisor

Edit Save Cancel Undo/Redo Hide Tax Advisor Add Scenario Calculate

Tax Filing

Jane ▾ 2025 (PROV ▾) Jane ▾ 2027 (PROV ▾) Jane ▾ 2030 (PROV ▾) Jane ▾ 2035 (PROV ▾)

Hide Delete Hide Delete Hide Delete Hide Delete

Working Early Retirement Social Security SS & Roth Withdraws

Cash Flow Tax Return Cash Flow Tax Return 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

4 Client 2 Distributions

4 Other

4 Client1 Pension

4 Client2 Pension

4 Other

4 Roth Conversion

6a Client1 Social Security

6a Client2 Social Security

6b Total Social Security

7 Short Term Cap Gains

7 Long Term Cap Gains

31 Self Employ Biz - QBI

31 Self Employ Biz - not QBI

31 Sch E (no SE Tax) - QBI

31 Sch E (no SE Tax) - not QBI

31 All Other Schedule 1 Income

31 SE Tax Deduction

31 All Other Adj to Income

11 Income Total \$ 100,000 100,000 89,575 89,575 100,715 95,478 121,314 115,532

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 \$

overrides 14,881 17,501 18,506 20,311

12 Largest Ded - Schd A or St 14,881 17,501 18,506 20,311

13 Qual Biz Income Deduction

14 Cap Gains and Qual Dividends

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 % Eff Tax Rate 12 % Tax Bracket 6.4 % Eff Tax Rate 12 % Tax Bracket 5.9 % Eff Tax Rate 22 % Tax Bracket 12.2 % Eff Tax Rate

Approximate State Tax Calc

Discretionary Income \$ 86,317 83,852 95,327 106,474

Used on "Print 1040" Form Only

25a Tax Payments Withheld

32 All other tax credits

32 Estimated Tax Payments

33 Total Payments

34 Refund

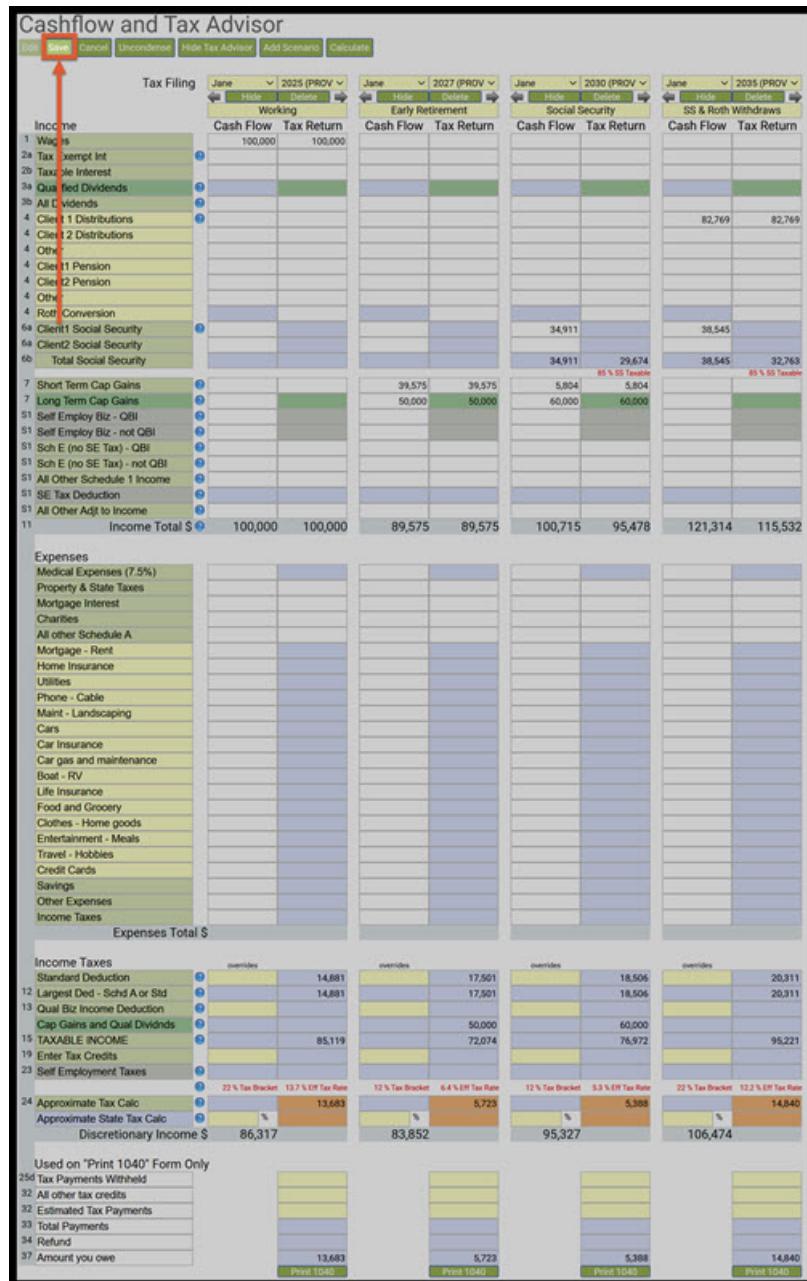
37 Amount you owe

13,683 5,723 5,388 14,840

Print 1040 Print 1040 Print 1040 Print 1040

↓

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



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.