

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

02/14/2025 10:20 am EST

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, the client name 'Doe, Jane' is displayed. Below it, a navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR' (highlighted with a red box and an arrow), 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The main content area is titled 'Structured Income Planning' and shows a scenario dropdown set to 'Hide and Unhide Tax Advisor Feature'. Below this is a table with columns for 'Year', 'Jane', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Jane Wages', 'Jane SS', 'Income Tax', 'After Tax Income', 'After Tax Target', 'Income Gap', and 'Year'. The table contains data for years 2025 through 2044, including various financial metrics and percentages.

Year	Jane	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	2,000,000	0	0	0	0	0	0	
initial amount		750,000	1,250,000	2,000,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.00 %	Eff Tax Rate		Infl Factor 2.00 %	from total income to target	
bonus % w/bonus		0.00 %	0.00 %	0	0	0	0	0	0	0	0	
2025	65	787,500	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	2,226,286	88,963	0	0	(529)-6%	88,434	88,434	0	2027
2028	68	727,193	91,025	2,246,576	91,025	0	0	(822)-6%	90,203	90,203	0	2028
2029	69	670,431	93,122	2,265,782	93,122	0	0	(1,115)-6%	92,007	92,007	0	2029
2030	70	642,412	61,540	2,317,532	61,540	0	34,911	(2,604)-5%	93,847	93,847	0	2030
2031	71	611,626	62,906	2,370,502	62,906	0	35,609	(2,792)-5%	95,724	95,724	0	2031
2032	72	577,911	64,297	2,424,730	64,297	0	36,321	(2,980)-5%	97,638	97,638	0	2032
2033	73	541,094	65,712	2,480,254	65,712	0	37,048	(3,169)-5%	99,591	99,591	0	2033
2034	74	500,996	67,153	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	0	38,545	(4,702)-12%	116,611	103,615	12,997	2035
2036	76	552,348	0	2,071,196	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	0	40,102	(4,892)-12%	125,655	107,801	17,854	2037
2038	78	608,964	0	2,093,785	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	0	41,722	(5,090)-12%	135,853	112,156	23,700	2039
2040	80	671,382	0	2,100,281	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	0	43,407	(5,296)-12%	146,374	116,687	29,687	2041
2042	82	740,199	0	2,088,532	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	0	45,161	(5,510)-12%	157,648	121,401	36,247	2043
2044	84	816,069	0	2,055,201	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

[Edit](#) Dynamic Mode

Tax Filing	2025 (PROJ)	2027 (PROJ)	2030 (PROJ)	2035 (PROJ)		
	Working		Early Retirement	Social Security	SS & Roth Withdraws	
	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						
4 Qualified Dividends						
5 All Dividends						
6 Client 1 Distributions					82,769	82,769
7 Client 2 Distributions						
8 Other						
9 Client 1 Pension						
10 Client 2 Pension						
11 Other						
12 Roth Conversion						
13a Client 1 Social Security				34,911		38,545
13b Client 2 Social Security						
14 Total Social Security				34,911	29,674	38,545
15 Short Term Cap Gains			39,575	39,575	5,804	5,804
16 Long Term Cap Gains			50,000	50,000	60,000	60,000
17 Self Employ Biz - QBI						
18 Self Employ Biz - not QBI						
19 Sch E (no SE Tax) - QBI						
20 Sch E (no SE Tax) - not QBI						
21 All Other Schedule 1 Income						
22 SE Tax Deduction						
23 All Other Adj to Income						
Income Total \$	100,000	100,000	89,575	89,575	100,715	95,478
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
24 Largest Ded - Schd A or Std		14,881		17,501		18,506
25 Qual Biz Income Deduction						
26 Cap Gains and Qual Dividnds				50,000		60,000
27 TAXABLE INCOME		85,119		72,074		76,972
28 Enter Tax Credits						
29 Self Employment Taxes						
30 Approximate Tax Calc	22 % Tax Bracket 13.7 % EIT Tax Rate	13,683	12 % Tax Bracket 6.4 % EIT Tax Rate	5,723	12 % Tax Bracket 5.3 % EIT Tax Rate	5,388
31 Approximate State Tax Calc	%	13,683	%	5,723	%	5,388
Discretionary Income \$	86,317	86,317	83,852	83,852	95,327	106,474
Used on "Print 1040" Form Only						
32 Tax Payments Withheld						
33 All other tax credits						
34 Estimated Tax Payments						
35 Total Payments						
36 Refund						
37 Amount you owe		13,683		5,723		5,388
		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.

SIPS
Doe, Jane

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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)		Jane 2027 (PROV)		Jane 2030 (PROV)		Jane 2035 (PROV)	
	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							82,769	82,769
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	29,674	38,545	32,763
						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		
S1 Self Employ Biz - QBI								
S1 Self Employ Biz - not QBI								
S1 Sch E (no SE Tax) - QBI								
S1 Sch E (no SE Tax) - not QBI								
S1 All Other Schedule 1 Income								
S1 SE Tax Deduction								
S1 All Other Adj't to Income								
11 Income Total \$	100,000	100,000	89,575	89,575	100,715	95,478	121,314	115,532

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

Edit Save Cancel Uncondense Use Tax Advisor Add Scenario Calculate

Tax Filing

	Jane	Jane	Jane	Jane
	Working	Early Retirement	Social Security	SS & Roth Withdrawal
	Cash Flow	Cash Flow	Cash Flow	Cash Flow
Income				
1 Wages	100,000			
2b Taxable Interest				
3b 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				
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 \$			34,911	121,314
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 original view.

Cashflow and Tax Advisor

Edit Save Cancel Uncondense Use Tax Advisor Add Scenario Calculate

	Tax Filing			
	Jane	Jane	Jane	Jane
	Hide Delete	Hide Delete	Hide Delete	Hide Delete
	Working	Early Retirement	Social Security	SS & Roth With
	Cash Flow	Cash Flow	Cash Flow	Cash Flow
Income				
1 Wages	100,000			
2b Taxable Interest				
3b 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				
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 \$			34,911	121,314
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

Save Cancel Undo/Redo Hide Tax Advisor Add Scenario Calculate

Tax Filing

	2025 (PROV)	2027 (PROV)	2030 (PROV)	2035 (PROV)
	Cash Flow	Tax Return	Cash Flow	Tax Return
Income				
1 Wages	100,000	100,000		
24 Tax Exempt Int				
20 Taxable Interest				
34 Qualified Dividends				
39 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				
64 Client1 Social Security			34,911	38,545
64 Client2 Social Security				
64 Total Social Security			34,911	38,545
7 Short Term Cap Gains		39,575	39,575	
7 Long Term Cap Gains		50,000	50,000	
31 Self Employ Biz - QBI			5,804	5,804
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 S	100,000	100,000	100,715	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 - Sched A or Std	14,881	17,501	18,506	20,311
13 Qual Biz Income Deduction				
Cap Gains and Qual Dividnds		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				
246 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

Tax Filing	Jane 2025 (PROV)		Jane 2027 (PROV)		Jane 2030 (PROV)		Jane 2035 (PROV)	
	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
Income								
1 Wages	100,000	100,000						
24 Tax exempt Int								
20 Taxable Interest								
34 Qualified Dividends								
39 All Dividends								
4 Client 1 Distributions							82,769	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			38,543
64 Client2 Social Security								
68 Total Social Security					34,911	29,474	38,543	32,763
						85 % SE Taxable		85 % SE 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		
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 \$								
Income Taxes								
Standard Deduction	overrides	14,881	overrides	17,501	overrides	18,506	overrides	20,311
12 Largest Ded - Sched A or Std	overrides	14,881	overrides	17,501	overrides	18,506	overrides	20,311
13 Qual Biz Income Deduction								
Cap Gains and Qual Dividnds				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								
26 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

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.