

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

01/12/2026 11:26 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.

Year	Jane	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
2025	65	787,500	0	1,312,500	0	100,000	0	(13,700)-14%	86,300	85,000	1,300	2025
2026	66	826,875	0	1,378,125	0	102,000	0	(13,974)-14%	88,026	86,700	1,326	2026
2027	67	779,255	88,963	1,447,031	0	0	0	(529)-6%	88,434	88,434	0	2027
2028	68	727,193	91,025	1,519,382	0	0	0	(822)-6%	90,203	90,203	0	2028
2029	69	670,431	93,122	1,595,352	0	0	0	(1,115)-6%	92,007	92,007	0	2029
2030	70	642,412	61,540	1,675,119	0	34,911	0	(2,604)-5%	93,847	93,847	0	2030
2031	71	611,626	62,906	1,758,875	0	35,609	0	(2,792)-5%	95,724	95,724	0	2031
2032	72	577,911	64,297	1,846,818	0	36,321	0	(2,980)-5%	97,638	97,638	0	2032
2033	73	541,094	65,712	1,939,159	0	37,048	0	(3,169)-5%	99,591	99,591	0	2033
2034	74	500,996	67,153	2,036,117	0	37,789	0	(3,359)-5%	101,583	101,583	0	2034
2035	75	526,046	0	2,055,154	82,769	38,545	0	(4,702)-12%	116,611	103,615	12,997	2035
2036	76	552,348	0	2,071,196	86,715	39,315	0	(4,796)-12%	121,234	105,687	15,548	2036
2037	77	579,965	0	2,084,310	90,445	40,102	0	(4,892)-12%	125,655	107,801	17,854	2037
2038	78	608,964	0	2,093,785	94,741	40,904	0	(4,990)-12%	130,655	109,957	20,698	2038
2039	79	639,412	0	2,099,242	99,232	41,722	0	(5,090)-12%	135,863	112,156	23,708	2039
2040	80	671,382	0	2,100,281	103,923	42,556	0	(5,192)-12%	141,287	114,999	26,889	2040
2041	81	704,951	0	2,097,033	108,262	43,407	0	(5,296)-12%	146,374	116,687	29,687	2041
2042	82	740,199	0	2,088,532	113,353	44,276	0	(5,402)-12%	152,227	119,021	33,207	2042
2043	83	777,209	0	2,074,962	117,996	45,161	0	(5,510)-12%	157,648	121,401	36,247	2043
2044	84	816,069	0	2,055,201	123,510	46,064	0	(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**

[Edit](#) [Dynamic Mode](#)

Tax Filing	June 2025 (PROJ)	June 2027 (PROJ)	June 2030 (PROJ)	June 2035 (PROJ)
	Cash Flow	Tax Return	Cash Flow	Tax Return
<b>Income</b>				
1 Wages	100,000	100,000		
2 Tax Exempt Int				
2 Taxable Interest				
3 Qualified Dividends				
3 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
7 Short Term Cap Gains		39,575	39,575	5,804
7 Long Term Cap Gains		50,000	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	100,000	89,575	89,575
			100,715	95,478
			121,314	115,532
<b>Expenses</b>				
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 \$				
<b>Income Taxes</b>				
Standard Deduction	14,881	17,501	18,506	20,311
12 Largest Ded - Schd 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
<b>Used on "Print 1040" Form Only</b>				
254 Tax Payments Withheld				
32 All other tax credits				
32 Estimated Tax Payments				
33 Total Payments				
34 Refund	13,683	5,723	5,388	14,840
37 Amount you owe				

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

**Doe, Jane**

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

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

## Cashflow and Tax Advisor

Edit Save Cancel Uncondense **Hide Tax Advisor** Add Scenario Calculate

Tax Filing

Jane 2025 (PROV)

Hide Delete

Working

Cash Flow Tax Return

Jane 2027 (PROV)

Hide Delete

Early Retirement

Cash Flow Tax Return

Jane 2030 (PROV)

Hide Delete

Social Security

Cash Flow Tax Return

Jane 2035 (PROV)

Hide Delete

SS & Roth Withdraws

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**

**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 \$**

	Jane Working Cash Flow	Jane Early Retirement Cash Flow	Jane Social Security Cash Flow	Jane SS & Roth Withdrawal Cash Flow
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 <b>Income Total \$</b>	100,000		34,911	121,314
<b>Expenses</b>				
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				
<b>Expenses Total \$</b>				
<b>Discretionary Income \$</b>	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 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 6: Cash Flow and Tax Return View:** The screen should automatically go back to its original view.



**Cashflow and Tax Advisor**

Save    Cancel    Uncondense    Hide Tax Advisor    Add Scenario    Calculate

**Tax Filing**

	2025 (PROV)	2027 (PROV)	2030 (PROV)	2035 (PROV)
<b>Income</b>	<b>Cash Flow</b>	<b>Tax Return</b>	<b>Cash Flow</b>	<b>Tax Return</b>
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				
4 Other				
4 Client1 Pension				
4 Client2 Pension				
4 Other				
64 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	
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 S	100,000	89,575	100,715	121,314
<b>Expenses</b>				
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 S				
<b>Income Taxes</b>				
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				
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
<b>Used on "Print 1040" Form Only</b>				
246 Tax Payments Withheld				
32 All other tax credits				
32 Estimated Tax Payments				
39 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 Uncondense Hide Tax Advisor Add Scenario Calculate

Tax Filing: Jan 2025 (PROV) Jan 2027 (PROV) Jan 2030 (PROV) Jan 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
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 Client 1 Pension				
4 Client 2 Pension				
4 Other				
64 Roth Conversion				
64 Client 1 Social Security			34,911	38,543
64 Client 2 Social Security				
64 Total Social Security			34,911	38,543
7 Short Term Cap Gains		39,575	5,804	5,804
7 Long Term Cap Gains		50,000	60,000	
91 Self Employ Biz - QBI				
91 Self Employ Biz - not QBI				
91 Sch E (no SE Tax) - QBI				
91 Sch E (no SE Tax) - not QBI				
91 All Other Schedule 1 Income				
91 SE Tax Deduction				
91 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 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
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13 Qual Biz Income Deduction				
Cap Gains and Qual Dividends		50,000	60,000	
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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

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](mailto:support@planscout.com).