Hide/Unhide Feature for the Individual Columns on the Cash Flow and Tax Advisor Screen

01/12/2026 11:27 am EST

The hide/unhide button located within the columns beneath the client's name allows users to selectively hide or unhide columns on the landing page for the cash flow and tax advisor screen. 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 on how to turn on and off the hide/unhide features of these columns.

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

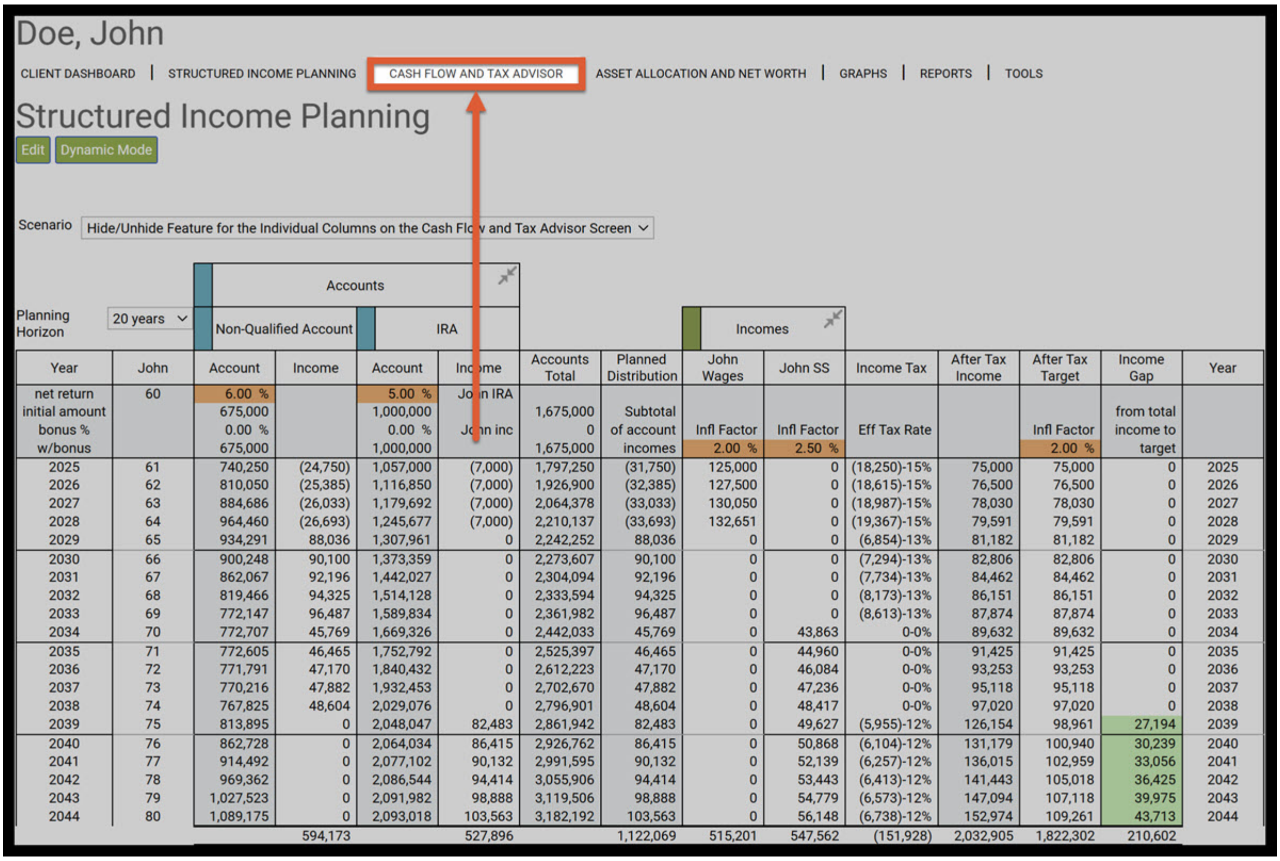
To learn more about the Cash Flow and Tax Advisor individual column features see articles:

- 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.



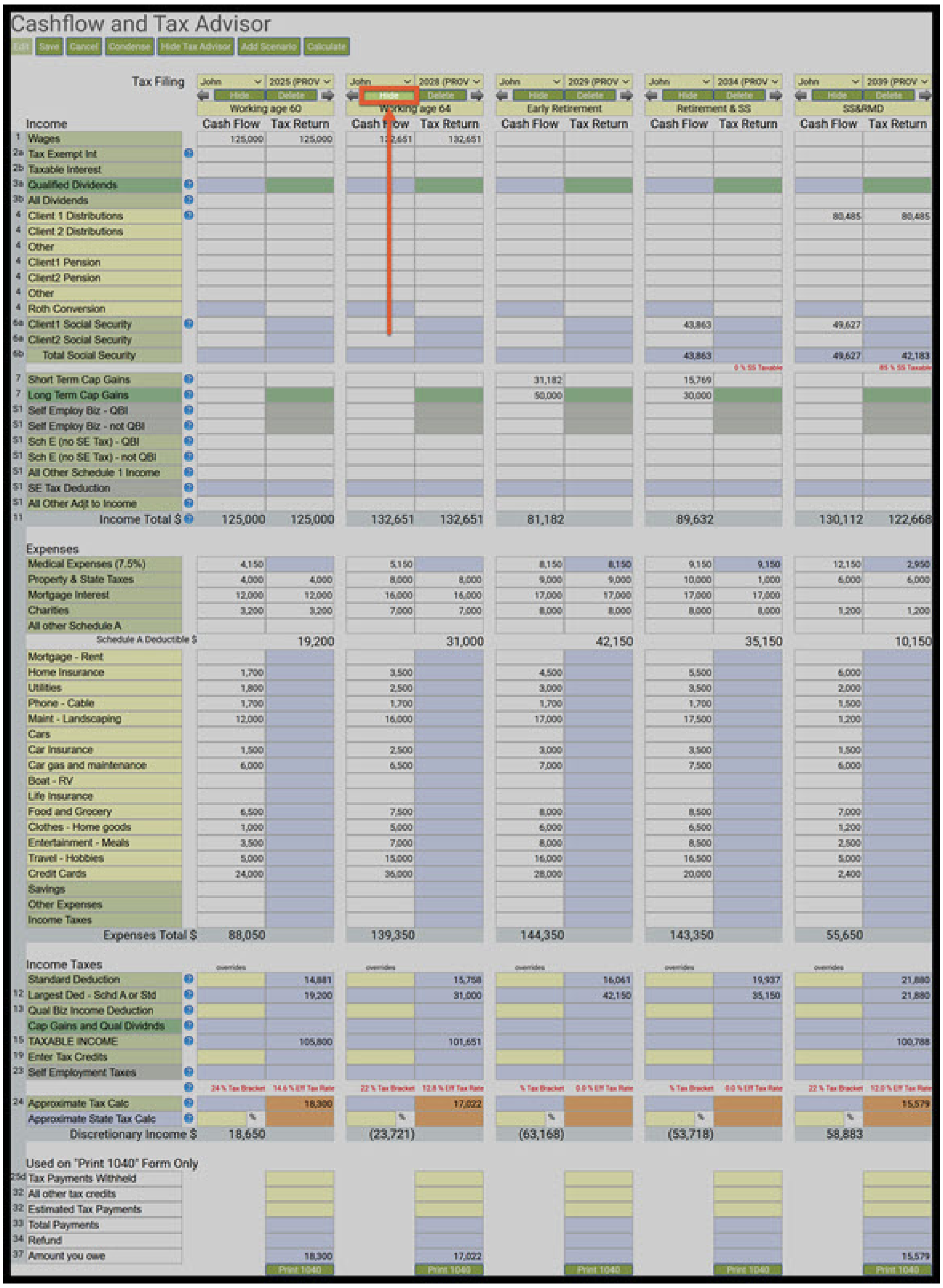
Year	John	Non-Qualified Account: Account	Non-Qualified Account: Income	IRA: Account	IRA: Income	Accounts Total	Planned Distribution	John Wages	John SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	60	6.00 %		5.00 %	John IRA									
initial amount		675,000		1,000,000		1,675,000	Subtotal						from total	
bonus %		0.00 %		0.00 %	John inc	0	of account	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
w/bonus		675,000		1,000,000		1,675,000	incomes	2.00 %	2.50 %			2.00 %	target	
2025	61	740,250	(24,750)	1,057,000	(7,000)	1,797,250	(31,750)	125,000	0	(18,250)-15%	75,000	75,000	0	2025
2026	62	810,050	(25,385)	1,116,850	(7,000)	1,926,900	(32,385)	127,500	0	(18,615)-15%	76,500	76,500	0	2026
2027	63	884,686	(26,033)	1,179,692	(7,000)	2,064,378	(33,033)	130,050	0	(18,987)-15%	78,030	78,030	0	2027
2028	64	964,460	(26,693)	1,245,677	(7,000)	2,210,137	(33,693)	132,651	0	(19,367)-15%	79,591	79,591	0	2028
2029	65	934,291	88,036	1,307,961	0	2,242,252	88,036	0	0	(6,854)-13%	81,182	81,182	0	2029
2030	66	900,248	90,100	1,373,359	0	2,273,607	90,100	0	0	(7,294)-13%	82,806	82,806	0	2030
2031	67	862,067	92,196	1,442,027	0	2,304,094	92,196	0	0	(7,734)-13%	84,462	84,462	0	2031
2032	68	819,466	94,325	1,514,128	0	2,333,594	94,325	0	0	(8,173)-13%	86,151	86,151	0	2032
2033	69	772,147	96,487	1,589,834	0	2,361,982	96,487	0	0	(8,613)-13%	87,874	87,874	0	2033
2034	70	772,707	45,769	1,669,326	0	2,442,033	45,769	0	43,863	0-0%	89,632	89,632	0	2034
2035	71	772,605	46,465	1,752,792	0	2,525,397	46,465	0	44,960	0-0%	91,425	91,425	0	2035
2036	72	771,791	47,170	1,840,432	0	2,612,223	47,170	0	46,084	0-0%	93,253	93,253	0	2036
2037	73	770,216	47,882	1,932,453	0	2,702,670	47,882	0	47,236	0-0%	95,118	95,118	0	2037
2038	74	767,825	48,604	2,029,076	0	2,796,901	48,604	0	48,417	0-0%	97,020	97,020	0	2038
2039	75	813,895	0	2,048,047	82,483	2,861,942	82,483	0	49,627	(5,955)-12%	126,154	98,961	27,194	2039
2040	76	862,728	0	2,064,034	86,415	2,926,762	86,415	0	50,868	(6,104)-12%	131,179	100,940	30,239	2040
2041	77	914,492	0	2,077,102	90,132	2,991,595	90,132	0	52,139	(6,257)-12%	136,015	102,959	33,056	2041
2042	78	969,362	0	2,086,544	94,414	3,055,906	94,414	0	53,443	(6,413)-12%	141,443	105,018	36,425	2042
2043	79	1,027,523	0	2,091,982	98,888	3,119,506	98,888	0	54,779	(6,573)-12%	147,094	107,118	39,975	2043
2044	80	1,089,175	0	2,093,018	103,563	3,182,192	103,563	0	56,148	(6,738)-12%	152,974	109,261	43,713	2044
			594,173		527,896		1,122,069	515,201	547,562	(151,928)	2,032,905	1,822,302	210,602	

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

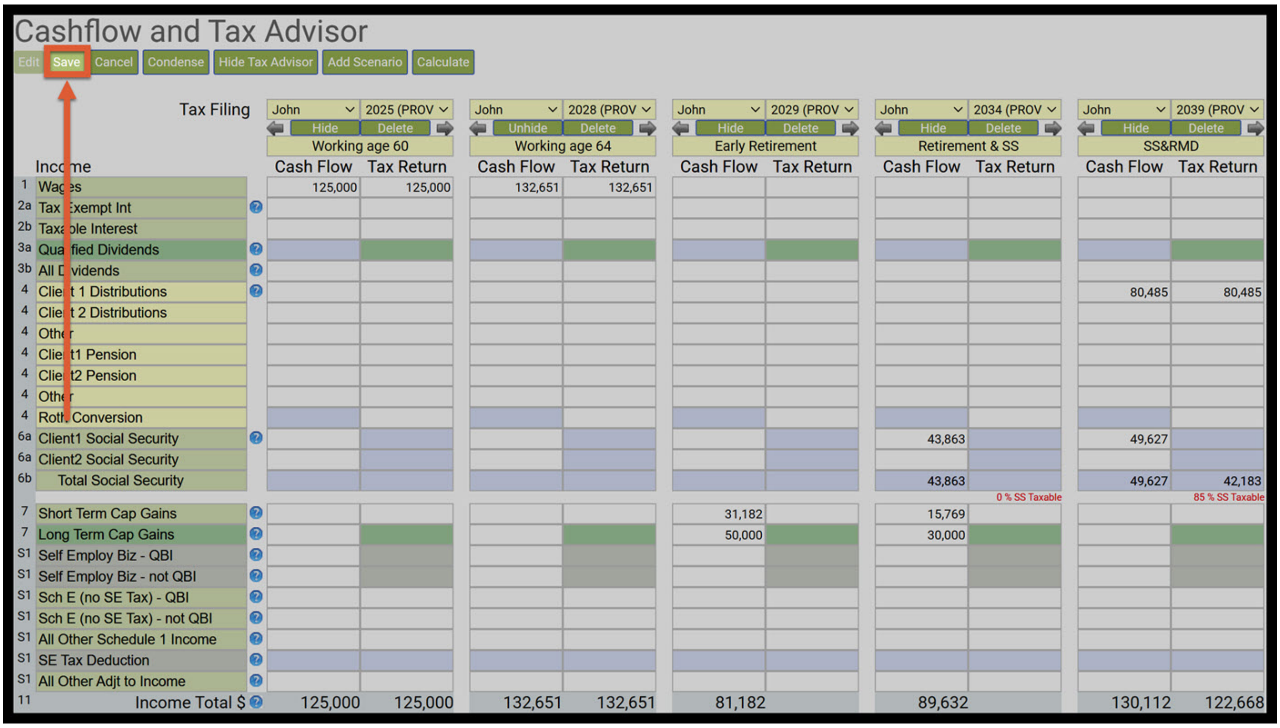
	Tax Filing	John	2025 (PRO\	John	2028 (PRO\	John	2029 (PRO\	John	2034 (PRO\	John	2039 (PRO\
		Working age 60		Working age 64		Early Retirement		Retirement & SS		SS&RMD	
	Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1	Wages	125,000	125,000	132,651	132,651						
2a	Tax Exempt Int										
2b	Taxable Interest										
3a	Qualified Dividends										
3b	All Dividends										
4	Client 1 Distributions									80,485	80,485
4	Client 2 Distributions										
4	Other										
4	Client1 Pension										
4	Client2 Pension										
4	Other										
4	Roth Conversion										
6a	Client1 Social Security							43,863		49,627	
6a	Client2 Social Security										
6b	Total Social Security							43,863		49,627	42,183
									0 % SS Taxable		85 % SS Taxable
7	Short Term Cap Gains					31,182		15,769			
7	Long Term Cap Gains					50,000		30,000			
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 Adjt to Income										
11	Income Total $	125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,668
	Expenses										
	Medical Expenses (7.5%)	4,150		5,150		8,150	8,150	9,150	9,150	12,150	2,950
	Property & State Taxes	4,000	4,000	8,000	8,000	9,000	9,000	10,000	1,000	6,000	6,000
	Mortgage Interest	12,000	12,000	16,000	16,000	17,000	17,000	17,000	17,000		
	Charities	3,200	3,200	7,000	7,000	8,000	8,000	8,000	8,000	1,200	1,200
	All other Schedule A										
	Schedule A Deductible $		19,200		31,000		42,150		35,150		10,150
	Mortgage - Rent										
	Home Insurance	1,700		3,500		4,500		5,500		6,000	
	Utilities	1,800		2,500		3,000		3,500		2,000	
	Phone - Cable	1,700		1,700		1,700		1,700		1,500	
	Maint - Landscaping	12,000		16,000		17,000		17,500		1,200	
	Cars										
	Car Insurance	1,500		2,500		3,000		3,500		1,500	
	Car gas and maintenance	6,000		6,500		7,000		7,500		6,000	
	Boat - RV										
	Life Insurance										
	Food and Grocery	6,500		7,500		8,000		8,500		7,000	
	Clothes - Home goods	1,000		5,000		6,000		6,500		1,200	
	Entertainment - Meals	3,500		7,000		8,000		8,500		2,500	
	Travel - Hobbies	5,000		15,000		16,000		16,500		5,000	
	Credit Cards	24,000		36,000		28,000		20,000		2,400	
	Savings										
	Other Expenses										
	Income Taxes										
	Expenses Total $	88,050		139,350		144,350		143,350		55,650	

	Income Taxes	overrides		overrides		overrides		overrides		overrides	
	Standard Deduction		14,881		15,758		16,061		19,937		21,880
12	Largest Ded - Schd A or Std		19,200		31,000		42,150		35,150		21,880
13	Qual Biz Income Deduction										
	Cap Gains and Qual Dividnds										
15	TAXABLE INCOME		105,800		101,651						100,788
19	Enter Tax Credits										
23	Self Employment Taxes										
		24 % Tax Bracket	14.6 % Eff Tax Rate	22 % Tax Bracket	12.8 % Eff Tax Rate	% Tax Bracket	0.0 % Eff Tax Rate	% Tax Bracket	0.0 % Eff Tax Rate	22 % Tax Bracket	12.0 % Eff Tax Rate
24	Approximate Tax Calc		18,300		17,022						15,579
	Approximate State Tax Calc	%		%		%		%		%	
	Discretionary Income $	18,650		(23,721)		(63,168)		(53,718)		58,883	
	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		18,300		17,022						15,579
			Print 1040		Print 1040		Print 1040		Print 1040		Print 1040

Step 3: Hide: Click on the green hide button underneath the Client's name. The button title will automatically change to Unhide when the process is done.



Step 4: Save: Click on the green save button underneath the Cash Flow and Tax Advisor heading.

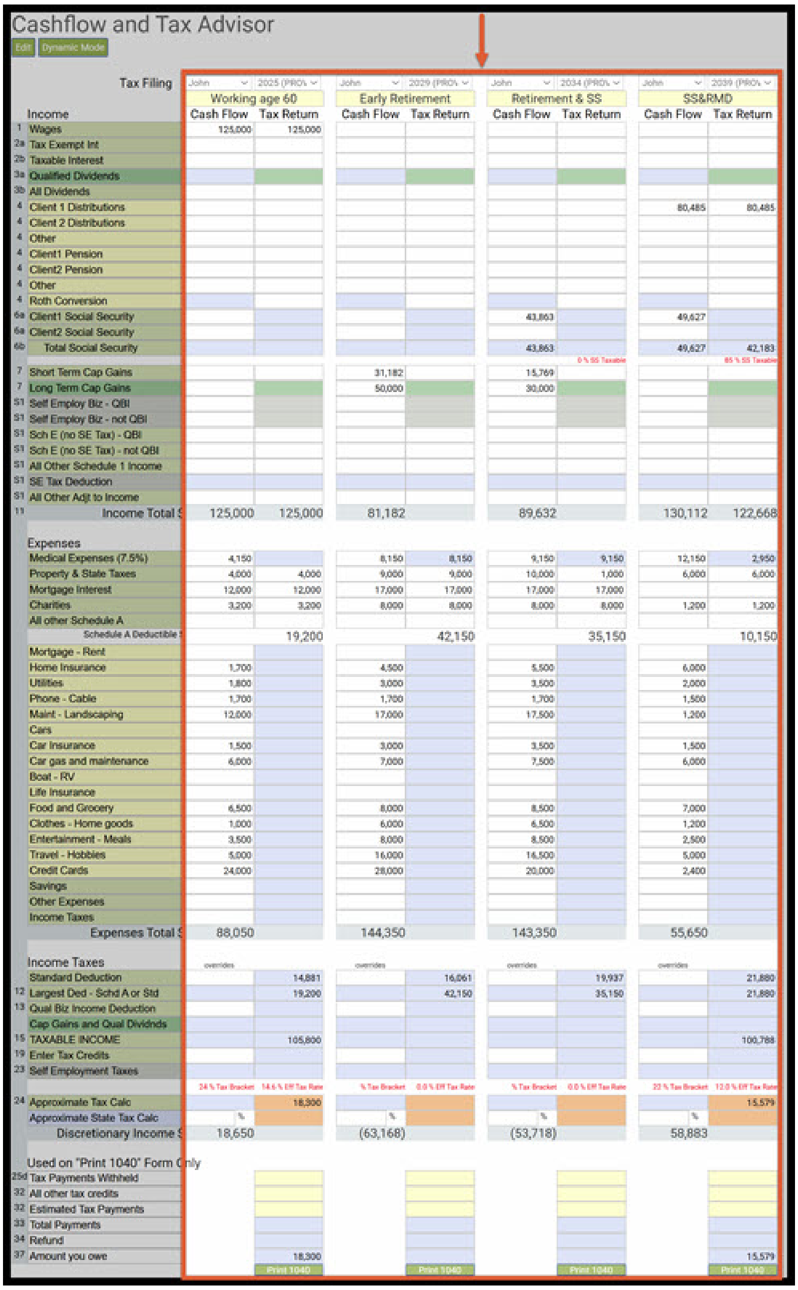


Cashflow and Tax Advisor

Edit | Save | Cancel | Condense | Hide Tax Advisor | Add Scenario | Calculate

Tax Filing	John	2025 (PROV	John	2028 (PROV	John	2029 (PROV	John	2034 (PROV	John	2039 (PROV
	Hide	Delete	Unhide	Delete	Hide	Delete	Hide	Delete	Hide	Delete
	Working age 60		Working age 64		Early Retirement		Retirement & SS		SS&RMD	
Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1 Wages	125,000	125,000	132,651	132,651						
2a Tax Exempt Int										
2b Taxable Interest										
3a Qualified Dividends										
3b All Dividends										
4 Client 1 Distributions									80,485	80,485
4 Client 2 Distributions										
4 Other										
4 Client1 Pension										
4 Client2 Pension										
4 Other										
4 Roth Conversion										
6a Client1 Social Security							43,863		49,627	
6a Client2 Social Security										
6b Total Social Security							43,863	0 % SS Taxable	49,627	42,183 85 % SS Taxable
7 Short Term Cap Gains					31,182		15,769			
7 Long Term Cap Gains					50,000		30,000			
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 Adjt to Income										
11 Income Total $	125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,668

Step 5: Cash Flow and Tax Advisor Screen: The column you selected to hide, should automatically not be showing on the landing page.

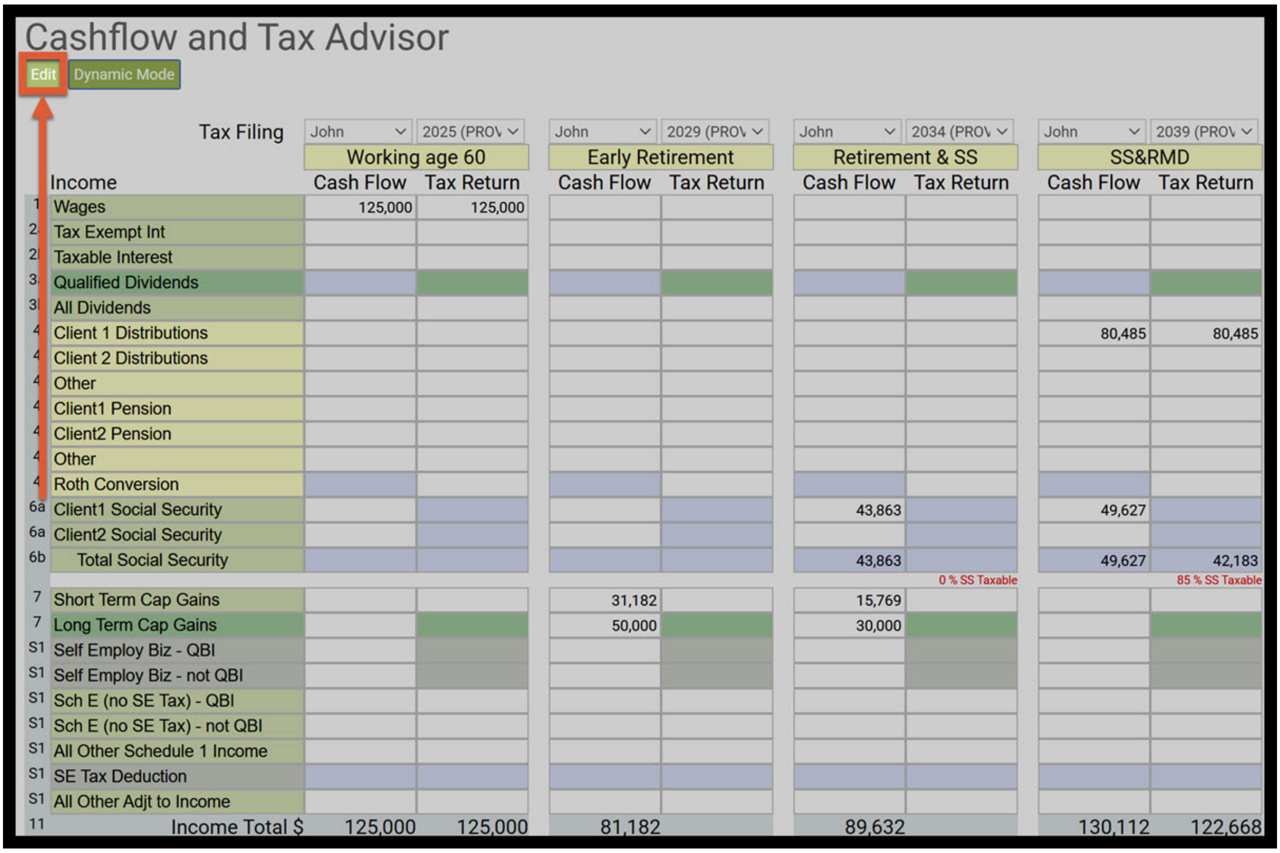


Cashflow and Tax Advisor

Edit | Dynamic Mode

	Tax Filing	John	2025 (PRO\	John	2029 (PRO\	John	2034 (PRO\	John	2039 (PRO\
		Working age 60		Early Retirement		Retirement & SS		SS&RMD	
	Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1	Wages	125,000	125,000						
2a	Tax Exempt Int								
2b	Taxable Interest								
3a	Qualified Dividends								
3b	All Dividends								
4	Client 1 Distributions							80,485	80,485
4	Client 2 Distributions								
4	Other								
4	Client1 Pension								
4	Client2 Pension								
4	Other								
4	Roth Conversion								
6a	Client1 Social Security					43,863		49,627	
6a	Client2 Social Security								
6b	Total Social Security					43,863		49,627	42,183
							0 % SS Taxable		85 % SS Taxable
7	Short Term Cap Gains			31,182		15,769			
7	Long Term Cap Gains			50,000		30,000			
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 to Income								
11	Income Total $	125,000	125,000	81,182		89,632		130,112	122,668
	Expenses								
	Medical Expenses (7.5%)	4,150		8,150	8,150	9,150	9,150	12,150	2,950
	Property & State Taxes	4,000	4,000	9,000	9,000	10,000	1,000	6,000	6,000
	Mortgage Interest	12,000	12,000	17,000	17,000	17,000	17,000		
	Charities	3,200	3,200	8,000	8,000	8,000	8,000	1,200	1,200
	All other Schedule A								
	Schedule A Deductible $		19,200		42,150		35,150		10,150
	Mortgage - Rent								
	Home Insurance	1,700		4,500		5,500		6,000	
	Utilities	1,800		3,000		3,500		2,000	
	Phone - Cable	1,700		1,700		1,700		1,500	
	Maint - Landscaping	12,000		17,000		17,500		1,200	
	Cars								
	Car Insurance	1,500		3,000		3,500		1,500	
	Car gas and maintenance	6,000		7,000		7,500		6,000	
	Boat - RV								
	Life Insurance								
	Food and Grocery	6,500		8,000		8,500		7,000	
	Clothes - Home goods	1,000		6,000		6,500		1,200	
	Entertainment - Meals	3,500		8,000		8,500		2,500	
	Travel - Hobbies	5,000		16,000		16,500		5,000	
	Credit Cards	24,000		28,000		20,000		2,400	
	Savings								
	Other Expenses								
	Income Taxes								
	Expenses Total $	88,050		144,350		143,350		55,650	
	Income Taxes	overrides		overrides		overrides		overrides	
	Standard Deduction		14,881		16,061		19,937		21,880
12	Largest Ded - Schd A or Std		19,200		42,150		35,150		21,880
13	Qual Biz Income Deduction								
	Cap Gains and Qual Dividnds								
15	TAXABLE INCOME		105,800						100,788
19	Enter Tax Credits								
23	Self Employment Taxes								
		24 % Tax Bracket	14.6 % Eff Tax Rate	% Tax Bracket	0.0 % Eff Tax Rate	% Tax Bracket	0.0 % Eff Tax Rate	22 % Tax Bracket	12.0 % Eff Tax Rate
24	Approximate Tax Calc		18,300						15,579
	Approximate State Tax Calc	%		%		%		%	
	Discretionary Income $	18,650		(63,168)		(53,718)		58,883	
	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		18,300						15,579
			Print 1040		Print 1040		Print 1040		Print 1040

Step 6: Edit: Click on the green edit button underneath the Cash Flow and Tax Advisor heading.

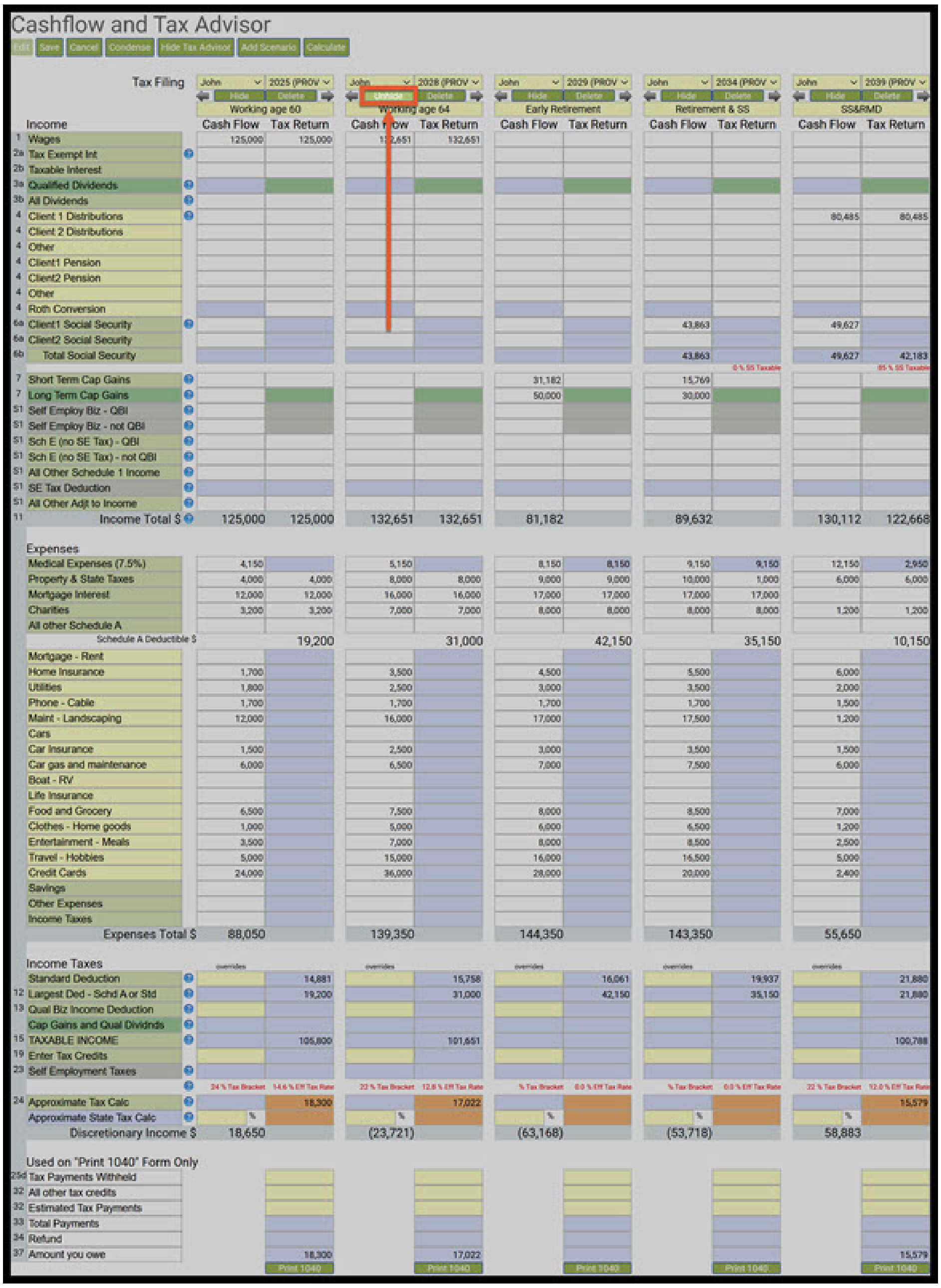


Cashflow and Tax Advisor

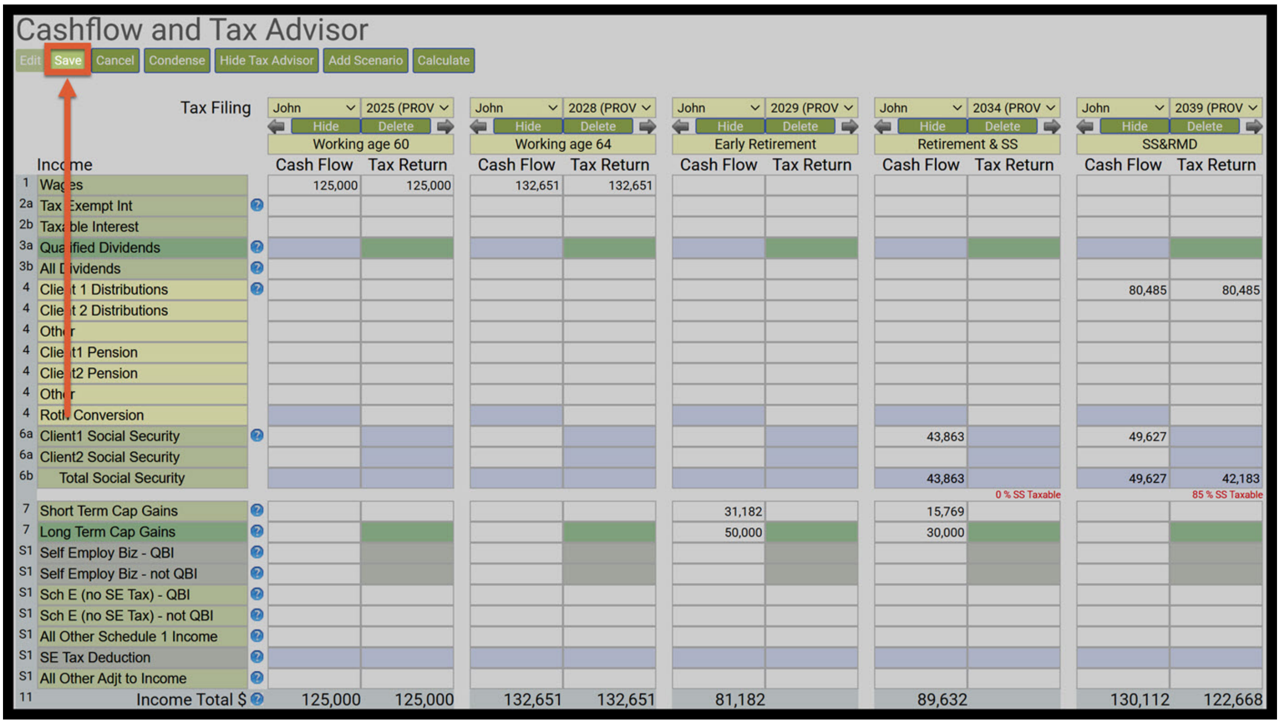
Edit | Dynamic Mode

	Tax Filing	John	2025 (PROV	John	2029 (PROV	John	2034 (PROV	John	2039 (PROV
		Working age 60		Early Retirement		Retirement & SS		SS&RMD	
	Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1	Wages	125,000	125,000						
2	Tax Exempt Int								
2	Taxable Interest								
3	Qualified Dividends								
3	All Dividends								
4	Client 1 Distributions							80,485	80,485
4	Client 2 Distributions								
4	Other								
4	Client1 Pension								
4	Client2 Pension								
4	Other								
4	Roth Conversion								
6a	Client1 Social Security					43,863		49,627	
6a	Client2 Social Security								
6b	Total Social Security					43,863		49,627	42,183
							0 % SS Taxable		85 % SS Taxable
7	Short Term Cap Gains			31,182		15,769			
7	Long Term Cap Gains			50,000		30,000			
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 Adjt to Income								
11	Income Total $	125,000	125,000	81,182		89,632		130,112	122,668

Step 7: Unhide: Click on the green unhide button underneath the Client's name. The button title will automatically change to Hide when the process is done.



Step 8: Save: Click on the green save button underneath the Cash Flow and Tax Advisor heading.



Step 9: Cash Flow and Tax Advisor Screen: The columns you selected to unhide, should be showing on the landing page.

Cashflow and Tax Advisor

Edit | Dynamic Mode

	Tax Filing	John	2025 (PRO\	John	2028 (PRO\	John	2029 (PRO\	John	2034 (PRO\	John	2039 (PRO\
		Working age 60		Working age 64		Early Retirement		Retirement & SS		SS&RMD	
	Income	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1	Wages	125,000	125,000	132,651	132,651						
2a	Tax Exempt Int										
2b	Taxable Interest										
3a	Qualified Dividends										
3b	All Dividends										
4	Client 1 Distributions									80,485	80,485
4	Client 2 Distributions										
4	Other										
4	Client1 Pension										
4	Client2 Pension										
4	Other										
4	Roth Conversion										
6a	Client1 Social Security							43,863		49,627	
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S1	Self Employ Biz - QBI										
S1	Self Employ Biz - not QBI										
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S1	Sch E (no SE Tax) - not QBI										
S1	All Other Schedule 1 Income										
S1	SE Tax Deduction										
S1	All Other Adj to Income										
11	Income Total $	125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,668
	Expenses										
	Medical Expenses (7.5%)	4,150		5,150		8,150	8,150	9,150	9,150	12,150	2,950
	Property & State Taxes	4,000	4,000	8,000	8,000	9,000	9,000	10,000	1,000	6,000	6,000
	Mortgage Interest	12,000	12,000	16,000	16,000	17,000	17,000	17,000	17,000		
	Charities	3,200	3,200	7,000	7,000	8,000	8,000	8,000	8,000	1,200	1,200
	All other Schedule A										
	Schedule A Deductible		19,200		31,000		42,150		35,150		10,150
	Mortgage - Rent										
	Home Insurance	1,700		3,500		4,500		5,500		6,000	
	Utilities	1,800		2,500		3,000		3,500		2,000	
	Phone - Cable	1,700		1,700		1,700		1,700		1,500	
	Maint - Landscaping	12,000		16,000		17,000		17,500		1,200	
	Cars										
	Car Insurance	1,500		2,500		3,000		3,500		1,500	
	Car gas and maintenance	6,000		6,500		7,000		7,500		6,000	
	Boat - RV										
	Life Insurance										
	Food and Grocery	6,500		7,500		8,000		8,500		7,000	
	Clothes - Home goods	1,000		5,000		6,000		6,500		1,200	
	Entertainment - Meals	3,500		7,000		8,000		8,500		2,500	
	Travel - Hobbies	5,000		15,000		16,000		16,500		5,000	
	Credit Cards	24,000		36,000		28,000		20,000		2,400	
	Savings										
	Other Expenses										
	Income Taxes										
	Expenses Total $	88,050		139,350		144,350		143,350		55,650	
	Income Taxes	overrides		overrides		overrides		overrides		overrides	
	Standard Deduction		14,881		15,758		16,061		19,937		21,880
12	Largest Ded - Schd A or Std		19,200		31,000		42,150		35,150		21,880
13	Qual Biz Income Deduction										
	Cap Gains and Qual Dividnds										
15	TAXABLE INCOME		105,800		101,651						100,788
19	Enter Tax Credits										
23	Self Employment Taxes										
		24 % Tax Bracket	14.6 % Eff Tax Rate	22 % Tax Bracket	12.8 % Eff Tax Rate	% Tax Bracket	0.0 % Eff Tax Rate	% Tax Bracket	0.0 % Eff Tax Rate	22 % Tax Bracket	12.0 % Eff Tax Rate
24	Approximate Tax Calc		18,300		17,022						15,579
	Approximate State Tax Calc	%		%		%		%		%	
	Discretionary Income $	18,650		(23,721)		(63,168)		(53,718)		58,883	
	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		18,300		17,022						15,579
			Print 1040		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: support@planscout.com.