

# 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.

## Structured Income Planning

Edit | Dynamic Mode

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

Planning Horizon	Accounts					Incomes					Income Gap	Year	
	Non-Qualified Account		IRA			Accounts Total	Planned Distribution	John		Income Tax	After Tax Income	After Tax Target	
	Year	John	Account	Income	Account	Income		Wages	SS				
net return	60	6.00 %			5.00 %		John IRA						
initial amount		675,000			1,000,000		John inc						
bonus %		0.00 %			0.00 %								
w/bonus		675,000			1,000,000								
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
		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.

**Cashflow and Tax Advisor**

**EB Dynamic Mode**

**Tax Filing**

	John	2025 (PBOC)	John	2028 (PBOC)	John	2029 (PBOC)	John	2034 (PBOC)	John	2039 (PBOC)
Income										
1 Wages	125,000	125,000		132,651	132,651					
2 Tax Exempt Int										
3 Taxable Interest										
3.1 Qualified Dividends										
3.2 All Dividends										
4 Client 1 Distributions										
4 Client 2 Distributions										
4 Other										
4 Client1 Pension										
4 Client2 Pension										
4 Other										
4.1 Roth Conversion										
64 Client1 Social Security								43,863	49,627	
64 Client2 Social Security								43,863	49,627	42,183
65 Total Social Security										
7 Short Term Cap Gains								15,769		
7 Long Term Cap Gains								30,000		
51 Self Employ Biz - C-BI										
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 \$	125,000	125,000		132,651	132,651			89,632		
Expenses										
Medical Expenses (7.5%)	4,150			5,150				9,150	9,150	
Property & State Taxes	4,000	4,000		8,000	9,000			10,000	1,000	
Mortgage Interest	12,000	12,000		16,000	16,000			17,000	17,000	
Charities	3,200	3,200		7,000	7,000			8,000	8,000	
All other Schedule A										
Schedule A Deductible \$	19,200			31,000				35,150		
Mortgage - Rent								5,500		
Home Insurance	1,700			3,500				3,500		
Utilities	1,800			2,500				1,700		
Phone - Cable	1,700			1,700				17,000		
Maint - Landscaping	12,000			16,000				17,500		
Cars								3,500		
Car Insurance	1,500			2,500				1,500		
Car gas and maintenance	6,000			6,500				7,500		
Boat - RV									6,000	
Life Insurance										
Food and Grocery	6,500			7,500				8,500		
Clothes - Home goods	1,000			5,000				6,500		
Entertainment - Meals	3,500			7,000				8,500		
Travel - Hobbies	5,000			15,000				16,500		
Credit Cards	24,000			36,000				20,000		
Savings										
Other Expenses										
Income Taxes										
Standard Deduction	14,681			15,758				16,061		
12 Largest Ded - Schd A or Std	19,200			31,000				42,150		
13 Qual Biz Income Deduction									19,937	
14 Cap Gains and Qual Dividends									35,150	
19 TAXABLE INCOME	105,800			101,651						
19 Enter Tax Credit										100,788
23 Self Employment Taxes										
24 Approximate Tax Calc	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
Approximate State Tax Calc										
Discretionary Income \$	18,650		(23,721)	17,622	(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		Print 1040	Print 1040	Print 1040	Print 1040		
	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.

Cashflow and Tax Advisor											
Tax Filing		John, 2025 (PROV)		John, 2028 (PROV)		John, 2029 (PROV)		John, 2034 (PROV)		John, 2039 (PROV)	
Income		Working age 60		Working age 64		Early Retirement		Retirement & SSS		SSS&RMD	
1. Wages		Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return
1a Tax Exempt Int		125,000	125,000	132,651	132,651						
2b Taxable Interest											
3b Qualified Dividends											
4 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											
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 \$		125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,666
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											
Income Taxes											
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											
14 Qual Gains and Qual Dividends											
15 TAXABLE INCOME		105,800		101,651						100,798	
19 Enter Tax Credits											
23 Self Employment Taxes											
24 Approximate Tax Calc		24 % Tax Bracket 14.6 % Eff Tax Rate	18,300	22 % Tax Bracket 12.8 % Eff Tax Rate	17,022	% Tax Bracket 0.0 % Eff Tax Rate		% Tax Bracket 0.0 % Eff Tax Rate		22 % Tax Bracket 12.0 % Eff Tax Rate	
Approximate State Tax Calc											
Discretionary Income \$		18,650		(23,721)		(63,168)		(53,718)		59,883	
Used on 'Print 1040' Form Only											
25 Tax Payments Withheld											
32 All other tax credits											
33 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 4: Save: Click on the green save button underneath the Cash Flow and Tax Advisor heading.

Cashflow and Tax Advisor																
Tax Filing		John 2025 (PROV) Working age 60		John 2028 (PROV) Working age 64		John 2029 (PROV) Early Retirement		John 2034 (PROV) Retirement & SS		John 2039 (PROV) SS&RMD						
Income		Cash Flow		Tax Return		Cash Flow		Tax Return		Cash Flow						
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																
4 Client 2 Distributions																
4 Other																
4 Client 1 Pension																
4 Client 2 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																
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		132,651		132,651		81,182		89,632		130,112		122,668

**Cashflow and Tax Advisor**

Edit Dynamic Mode

Tax Filing	John 2025 (PBOC)		John 2029 (PBOC)		John 2034 (PBOC)		John 2039 (PBOC)			
	Working age 60	Cash Flow	Early Retirement	Cash Flow	Tax Return	Retirement & SS	Cash Flow	Tax Return	SS&RMD	Cash Flow
Income										
1 Wages	125,000	125,000								
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										
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 \$	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		1,750			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										
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										
14 Cap Gains and Qual Dividends										
15 TAXABLE INCOME		105,800								100,788
19 Enter Tax Credit										
23 Self Employment Taxes										
24 Approximate Tax Calc		24 % Tax Bracket 14.6 % Eff Tax Rate		24 % Tax Bracket 0.0 % Eff Tax Rate		24 % Tax Bracket 0.0 % Eff Tax Rate		24 % Tax Bracket 12.0 % Eff Tax Rate		
Approximate State Tax Calc		16,300								15,579
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		Print 1040		Print 1040		Print 1040		15,579

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)	Working age 60	John	2029 (PROV)	Early Retirement	John	2034 (PROV)	Retirement & SS	John	2039 (PROV)	SS&RMD
		Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return	Cash Flow	Tax Return		
Income													
1	Wages	125,000	125,000									80,485	80,485
2	Tax Exempt Int												
2	Taxable Interest												
3	Qualified Dividends												
3	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							43,863				49,627	
6a	Client2 Social Security											49,627	42,183
6b	Total Social Security						43,863						0 % SS Taxable
7	Short Term Cap Gains					31,182		15,769					
7	Long Term Cap Gains					50,000		30,000					85 % SS Taxable
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

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.

Cashflow and Tax Advisor											
Tax Filing		John, 2025 (PROV) Working age 60		John, 2028 (PROV) Working age 64		John, 2029 (PROV) Early Retirement		John, 2034 (PROV) Retirement & SS		John, 2039 (PROV) 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											
4 Client 2 Distributions											
4 Other											
4 Client1 Pension											
4 Client2 Pension											
4 Other											
4 Roth Conversion											
6a Client1 Social Security											
6b Client2 Social Security											
6b Total Social Security											
7 Short Term Cap Gains											
7 Long Term Cap Gains											
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 \$		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	10,000	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											
12 Standard Deduction		14,881		16,758		16,061		19,937		21,880	
12 Largest Ded - Sched A or Std		19,200		31,000		42,150		35,150		21,880	
13 Qual Biz Income Deduction											
14 Cap Gains and Dual Dividends											
15 TAXABLE INCOME		105,800		101,651						100,788	
19 Enter Tax Credits											
23 Self Employment Taxes											
24 Approximate Tax Calc		24 % Tax Bracket 14.6 % Eff Tax Rate	18,300	22 % Tax Bracket 12.8 % Eff Tax Rate	17,022	% Tax Bracket 6.0 % Eff Tax Rate		% Tax Bracket 0.0 % Eff Tax Rate		22 % Tax Bracket 12.0 % Eff Tax Rate	15,579
Approximate State Tax Calc			(23,721)		(63,168)			(53,718)			58,883
Discretionary Income \$		18,650									
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		18,300		17,022		Print 1040		Print 1040		Print 1040	

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

**Cashflow and Tax Advisor**

Save Cancel Condense Hide Tax Advisor Add Scenario Calculate

**Tax Filing**

Income		2025 (PROV)		2028 (PROV)		2029 (PROV)		2034 (PROV)		2039 (PROV)						
		John	Hide	Delete	John	Hide	Delete	John	Hide	Delete	John	Hide	Delete			
1	Wages	125,000			132,651			81,182			80,485					
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															
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		132,651		132,651		81,182		89,632		130,112		122,668

**0 % SS Taxable**

**85 % SS Taxable**

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

Tax Filing											
Income		John 2025 (PRO)		John 2028 (PRO)		John 2029 (PRO)		John 2034 (PRO)		John 2039 (PRO)	
1 Wages		Cash Flow	125,000	Cash Flow	132,651	Cash Flow		Cash Flow		Cash Flow	80,485
2a Tax Exempt Int		Tax Return	125,000	Tax Return	132,651	Tax Return		Tax Return		Tax Return	80,485
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											
4a Client1 Social Security											
4a Client2 Social Security											
4a Total Social Security											
7 Short Term Cap Gains											
7 Long Term Cap Gains											
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	5	125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,668
Expenses											
Medical Expenses (7.5%)		4,190		5,150		8,190	8,190	9,190	9,190	12,190	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		12,000	
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	5	88,050		139,350		144,350		143,350		55,650	
Income Taxes											
Standard Deduction			14,881		15,758		16,061		19,937		21,860
12 Largest Ded - Schd A or Std			19,200		31,000		42,150		35,150		21,860
13 Qual Biz Income Deduction											
Cap Gains and Qual Dividends											
15 TAXABLE INCOME			105,800		101,651						100,788
19 Enter Tax Credits											
23 Self Employment Taxes											
24 Approximate Tax Calc			24 % Tax Bracket	14.6 % EFT Tax Rate	22 % Tax Bracket	12.8 % EFT Tax Rate	20 % Tax Bracket	0.0 % EFT Tax Rate	22 % Tax Bracket	12.0 % EFT Tax Rate	
Approximate State Tax Calc			18,300		17,022						15,579
Discretionary Income			18,650		(23,721)		(63,168)		(53,718)		58,883
Used on "Print 1040" Form Only											
25 Tax Payments Withheld											
32 All other tax credits											
33 Estimated Tax Payments											
34 Total Payments											
34 Refund											
37 Amount you owe											
			18,300		17,022						15,579
			Pivot 1040		Pivot 1040						Pivot 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](mailto:support@planscout.com).