Permanent Deletion of the Individual Columns on the Cash Flow and Tax Advisor Page

02/14/2025 10:22 am EST

On the Cash Flow and Tax Advisor page, you can permanently delete individual columns after creating and adding a scenario. Below are the step-by-step directions for permanently deleting the individualized columns on the Cash Flow and Tax Advisor page.

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.

Doe, Jo	ohn													
CLIENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS														
Structu Edit Dynamic		ncom	e Plar	nning	1									
Scenario Perm	nanent Deleti	on of the Indiv	idual Column	son the Cash	Flow and Ta	x Advisor Scre	en 🗸							
Planning Horizon	20 years 🗸	Non-Qualit	fied Account		IRA									
Year	John	Account	Income	Account	Income	Accounts Total	Planned Distribution	John Wages	John SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return initial amount bonus % w/bonus	60	6.00 % 675,000 0.00 % 675,000		5.00 % 1,000,000 0.00 % 1,000,000	Join IRA Join inc	1,675,000 0 1,675,000	Subtotal of account incomes	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	from total income to 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 2027	62 63	810,050 884,686	(25,385) (26,033)	1,116,850 1,179,692	(7,000) (7,000)	1,926,900 2,064,378	(32,385) (33,033)	127,500 130,050	0	(18,615)-15% (18,987)-15%	76,500 78,030	76,500 78,030	0	2026 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 2032	67 68	862,067 819,466	92,196 94,325	1,442,027 1,514,128	0	2,304,094 2,333,594	92,196 94,325	0	0	(7,734)-13% (8,173)-13%	84,462 86,151	84,462	0	2031 2032
2032	69	772,147	94,325 96,487	1,514,128	0	2,333,594 2,361,982	94,325	0	0	(8,173)-13%	86,151	86,151 87,874	0	2032
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 2039	74 75	767,825 813,895	48,604	2,029,076 2,048,047	0 82,483	2,796,901 2,861,942	48,604 82,483	0	48,417 49.627	0-0% (5,955)-12%	97,020 126,154	97,020 98,961	0 27,194	2038 2039
2039	75	862,728	0	2,048,047	86,415	2,861,942	86,415	0	50.868	(6,104)-12%	120,134	100,940	30.239	2039
2040	77	914,492	0	2,004,034	90,132	2,991,595	90,132	0	52,139	(6,257)-12%	136,015	102,959	33,056	2040
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		025 (PRO% ~	John v 2		John v 20			34 (PRO% 🗸		1039 (PROV
	Working a	age 60	Working a	ige 64	Early Retire	ement	Retirement		SS&R	
Income	Cash Flow		Cash Flow T		Cash Flow T	ax Return	Cash Flow Ta	ax Return	Cash Flow	Tax Retu
Wages Tax Exempt Int	125,000	125,000	132,661	132,651						
Taxable Interest										
Qualified Dividends		_		_		_		-	-	_
All Dividends		_		_		_		_		_
Client 1 Distributions			1	1				1	80,485	80.
Client 2 Distributions										
Other			1	1						
Client1 Pension			-							
Client2 Pension	1									
Other					S					
Roth Conversion										
Client1 Social Security							43,863		49,627	
Client2 Social Security										
Total Social Security							43,863	0 % SS Taxable	49,627	42,
Short Term Cap Gains	1		13 ST		31,182		15,769	0.4.30.484808		
Long Term Cap Gains			1		50,000		30,000	1		
Self Employ Biz - QBI			5		Contraction of the	1000	1			
Self Employ Biz - not QBI										
Sch E (no SE Tax) - QBI					Province in					
Sch E (no SE Tax) - not QBI			i		S					
All Other Schedule 1 Income										
SE Tax Deduction										
All Other Adjt to Income										
Income Total \$	125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,
-										
Expenses Medical Expenses (7.5%)	4,150		5,150		8,150	8,150	9,150	9,150	12,150	2
	4,150	4000	8,000	8,000	9,000	9,000	10,000	1,000	6.000	6
Property & State Taxes Mortgage Interest	4,000	4,000	8,000	8,000	9,000	9,000	10,000	1,000	6,000	6
Charities	3,200	3,200	7,000	7,000	8,000	8,000	8,000	8,000	1,200	1
All other Schedule A	0.000	0,200	1.000	- 1000	0,000		0,000	0,000	-200	
Schedule A Deductible \$	2	19,200		31,000	1	42,150		35,150		10,
Mortgage - Rent				0.,000				00,100		,
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			1							
Other Expenses										
Income Taxes	88,050		139,350		144,350		143,350		55,650	
Expenses Total \$	00,000		139,350		144,350		143,330		35,650	
Income Taxes	numides		committee .		-		mentides		Constitutes	
Standard Deduction	Concession of the local data	14,881		15,758		16,061	The second second second	19,937		21
Largest Ded - Schd A or Std		19,200	1	31,000	1	42,150		35,150		21,
Qual Biz Income Deduction										
Cap Gains and Qual Dividnds										
TAXABLE INCOME		105,800		101,651						100
Enter Tax Credits					2					
Self Employment Taxes										
	24 % Tax Bracket		22 % Tax Bracket 1		% Tax Bracket	0.0 % Eff Tax Rate	% Tax Bracket 0	10 % Eff Tax Rate	22 % Tax Bracket	
Approximate Tax Calc		18,300		17,022	6			6		15
Approximate State Tax Calc	2 2.24 (199)	1000		1000			A CONTRACTOR OF			
Discretionary Income \$ Used on "Print 1040" Form Of Tax Payments Withheld All other tax credits			(23,721)		(63,168)		(53,718)		58,883	
All other tax credits Estimated Tax Payments Total Payments Refund										
7 Amount you owe		18.300		17.022						15
and have and		10/050		ar,med.						

Step 3: Delete: Click on the green delete button underneath the tax year in the individual column.

Tax Filin	9	John v 2	025 (PROV ~	John v 2	028 (PROV ~	John 🗸	2029 (PROV ~	John ~	2034 (PROV ~	John 🗸	2039 (PROV
		Working a	ce 60	Working	Working age 54		Delete	Retireme	nt & SS	SS8	RMD
Income		Cash Flow 1	ax Return	Cash Flow 1	Tax Return	Cash Flow		Cash Flow		Cash Flow	Tax Return
Wages Tax Exempt Int		125,000	125,000	132,651	132,651			-			
Taxable Interest								-			
Qualified Dividends	0		1			-		1	1		8
All Dividends	0	i		1		1					
Client 1 Distributions Client 2 Distributions	0							-		80,485	80,41
Other					-			-			
Client1 Pension			12								
Client2 Pension						8					
Other		-			_	-		-			
Roth Conversion Client1 Social Security		-						43,863	11	49.627	
Client2 Social Security	Ĩ							43,003		44,047	
Total Social Security								43,863		49,627	42,10
Short Term Cap Gains	0			I I		31,182		15,769	0 % SS Taxable		85 % 55 Texe
Long Term Cap Gains						50,000		30,000			
Self Employ Biz - QBI	0							1			
Self Employ Biz - not QBI Sch E (no SE Tax) - QBI	00							-			
Sch E (no SE Tax) - dol						1					
All Other Schedule 1 Income											
SE Tax Deduction	0						-	1			
All Other Adjt to Income	0	105 000	105 000	100.051	100 (51			00 (00		100.000	1004
Income Total \$		125,000	125,000	132,651	132,651	81,182		89,632		130,112	122,66
Expenses											
Medical Expenses (7.5%)		4,150		5,150		8,150	8,150	9,150	9,150	12,150	
Property & State Taxes		4,000	4,000	8,000	8,000	9,000	9,000	10,000	1,000	6,000	6,00
Mortgage Interest Charities		12,000	12,000	7,000	7,000	8,000	8,000	17,000	17,000	1,200	1.20
All other Schedule A		3,200	3,200		1,000	6,000	0,000	0,040	0,000	1,200	1,40
Schedule A Deductil	ole S		19,200		31,000		42,150		35,150		10,15
Mortgage - Rent		i and						10			
Home Insurance Utilities		1,700	_	3,500		4,500		5,500		6,000	
Phone - Cable		1,700		1,700		1,700		1,200		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 Boat - RV		6,000	_	6,500		7,000		7,500		6,000	
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 Credit Cards		5,000		15,000		16,000		16,500		5,000	
Savings		24000		36,000		28,000		20,000		2,400	
Other Expenses											
Income Taxes		00.000		100.000				140.000			
Expenses Tota	1 2	88,050		139,350		144,350		143,350		55,650	
Income Taxes		overrides		overrides		overrides		overrides		overrides	
Standard Deduction			14,001		15,758		16,061		19,937		21,8
Largest Ded - Schd A or Std			19,200		31,000	-	42,150	-	35,150		21,8
Qual Biz Income Deduction Cap Gains and Qual Dividnds	0						_	-			
TAXABLE INCOME			105,800		101,651						100,7
Enter Tax Credits								1			
Self Employment Taxes	0										
Approximate Tax Calc	0	24% Tax Bracket		22 % Tax Bracket		% Tax Bracket	0.0 % Eff Tax Rate	% Tax Bracket	GO % ER Tax Rate	22 N Tax Bracket	
Approximate Tax Calc Approximate State Tax Calc	0		18,300		17,022						15,5
Discretionary Incom				(23,721)		(63,168)		(53,718)		58,883	
Used on "Print 1040" Form 0	Inly										
Tax Payments Withheld											
All other tax credits Estimated Tax Payments		-									
Esemated tax Payments				_							
Total Payments Refund				-							

Step 4: Click OK: Click OK to the text message box that comes up from www.sipsplanning.net says, "Are you sure you would like to permanently delete this scenario?



Step 5: Save: SIPS will automatically remove the scenario. Click on the green Save button underneath the Cash Flow and Tax Advisor heading.

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4 Ore Conversion 10 Object 11 Object 12 Object 13 Object 14 Object 15 Et Tax - ot Object 15 Et Tax - ot Object 16 Object 16 Object 17 Object 18 Object 18 Object 19 Object 10 O					
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60 Total Social Security 1 7 Short Teim Cap Gains 1 7 Short Teim Cap Gains 1 81 Set Employ Biz - 000 1 82 Set Employ Biz - 000 1 83 Set Employ Biz - 000 1 84 Set Employ Biz - 000 1 85 1 1 86 1		43,863	1	49,627	
7 Short Term Cap Gains		43,863		49,627	42,1
7 Long Term Cap Gains 0 15 Set Empty Biz - Not GBI 0 16 Set Empty Biz - not GBI 0 17 Income Schedule I Income 0 18 All Other Aclt to Income 0 19 Income Total \$ 9 125,000 125,000 10 Income Total \$ 9 125,000 125,000 10 Income Total \$ 9 125,000 125,000 8 Expenses 12000 12000 12000 12000 Charlies 1,000 12000 <td></td> <td></td> <td>© % SS Taxable</td> <td>49,027</td> <td>85 % 55 Tare</td>			© % SS Taxable	49,027	85 % 55 Tare
31 Set Employ Bz - GBI 0 31 Set Employ Bz - RIG BI 0 32 Set Engloy Bz - RIG BI 0 32 Set Engloy Bz - RIG BI 0 32 Set Engloy Bz - RIG BI 0 33 Set Engloy Bz - RIG BI 0 35 Set Engloy Bz - RIG BI 125,000 36 Set Engloy Bz - RIG BI 12000 36 Set Engloy Bz - RIG BI 12000 37 Set Engloy Bz - RIG BI 12000 38 Set Engloy Bz - RIG BI 1300 Mortgage - Rent 1,700 Home Insurance 1,700 UBBSe 1,800 Proor - Cable 1,000 Mart - Landscaping 1,000 Cars 1,000 Cars Bat - RV 1,000 Cars Bat - RV 1,000 Cars Bat - RV 1,000	,182	15,769		-	
31 Self Employ B2 - And B8 Sche Erns Stav - not G8 Sche Tab - not G8	,000	30,000	_		
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31 Al Other Adjt to Income 9 125,000 125,000 8 11 Income Total \$ 9 125,000 125,000 8 Expenses 4150 4.000 4.000 Medical Expenses (7.5%) 4.150 4.000 4.000 Mortgage Interest 12.000 12.000 12.000 12.000 Charities 12.000 </td <td></td> <td>18</td> <td></td> <td></td> <td></td>		18			
Income Total \$ (*) 125,000 125,000 8 Expenses Medical Expenses (7.5%) 4.150 4.000 4.000 Medical Expenses (7.5%) 4.150 4.000 4.000 4.000 Mortgape Interest 1.2000 1.2200 1.2200 1.2200 1.2200 1.2000 1.2200 1.2000 1.2200 1.2000 1.2200 1.2000 <					
Expenses 4150 4000 4000 Property & State Taxes 4000 4000 4000 Motical Expense (7.5%) 4000 4000 4000 Motical Expenses (7.5%) 4000 4000 4000 Charties 3.200 3.200 3.200 3.200 All other Schedule A All other Schedule A 19,200 4000 4000 Mortgage - Rent 1.700 19,200 40000 40000 4000	182	89,632	,	130 112	122,60
Medical Expenses (7.5%) 4.190 4.190 Property & State Taxes 4.000 4.000 Martigape Interest 12.000 12.000 Charities 3.200 3.200 All other Schedule A 1 1 Martigape Interest 13.000 10,200 Martine Landscaping 12.000 10,000 Carls 1,000 10,000 Carls 1,000 10,000 Carls scrance 1,000 10,000 Carls scrance 1,000 10,000 Coltes - Hore poolds 1,000 10,000 Entertainment - Meals 3,000 10,000 Entertainment - Meals 3,000 14 Income Taxes series 12,000 Carls Schild A & State 13,000 14 Income Taxes	102	09,032		130,112	122,00
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74 Refund 17 Amount you owe 18,300	68)				15,5

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.