Troubleshooting: "social security information is blank." Error Message

01/12/2026 10:47 am EST

This article provides a step-by-step solution for the 'social security information is blank' error message. This error occures when you try to add Social Security income to the Structured Income Planning Page before entering the details on the Client Dashboard. Below is a hypothetical example of a client that would like to retire at age 67 and you would like to enter in the social security income when you are at the Structured Income Planning page.

To learn more about Add Inc Tax functions within SIPS Essentials see articles:

- Calculating and Applying Tax Rates in SIPS Essentials
- Setting Effective Tax Rates for SIPS Essentials

If you would like to learn more about advanced tax planning in SIPS Advanced see article:

- Understanding the Advanced Tax Planning Page

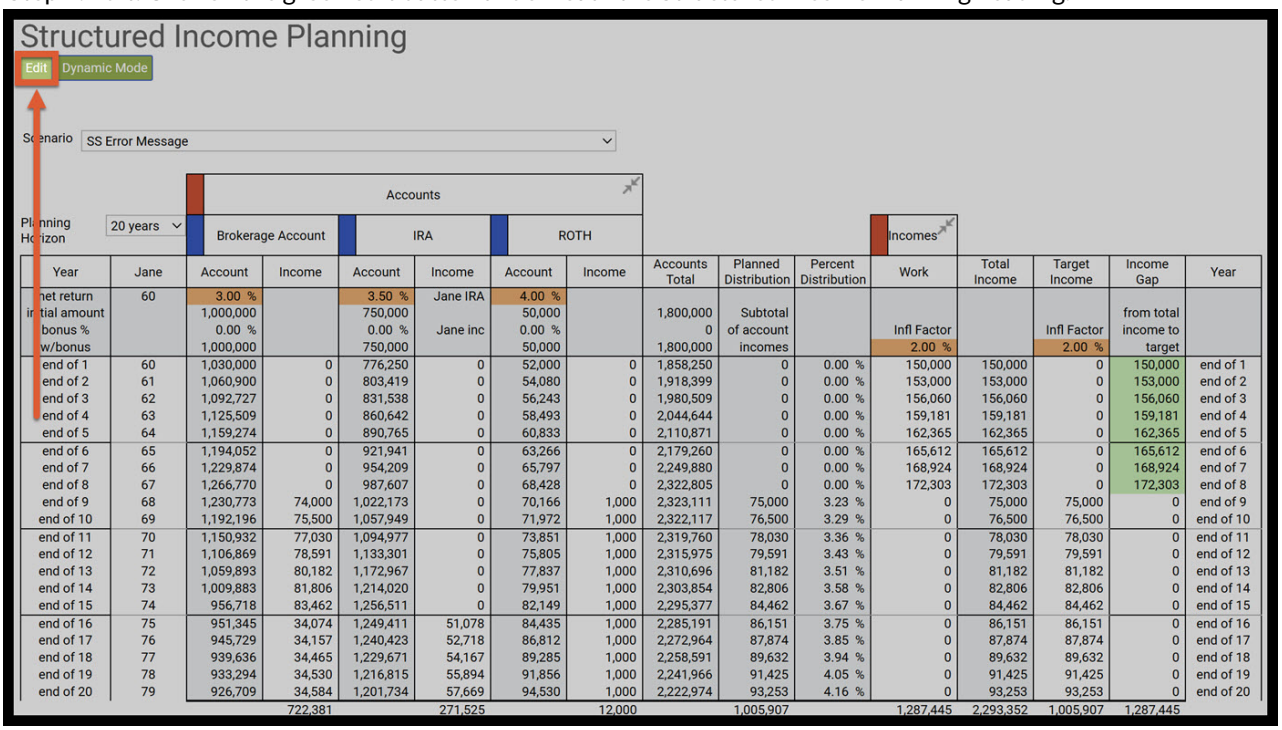
To learn about setting up tax calculations options for income and expesne see articles:

- Tax Calculation Option: Adding Assets into a Structured Income Plan
- Tax Calculation Option: Adding Income and Expenses into a Structured Income Plan

To learn more about forecasting effective tax rates see articles:

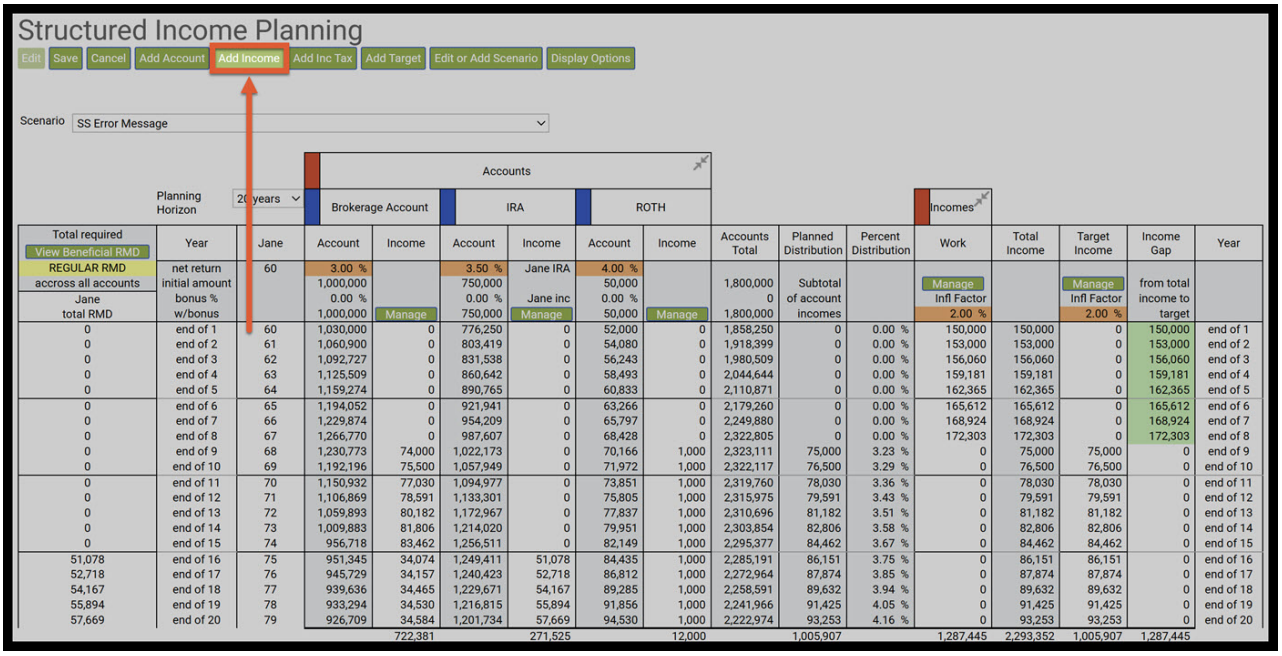
- Part One: Forecasting Effective Tax Rates While the Client is working

Step 1: Edit: Click on the green edit button underneath the Structured Income Planning heading.



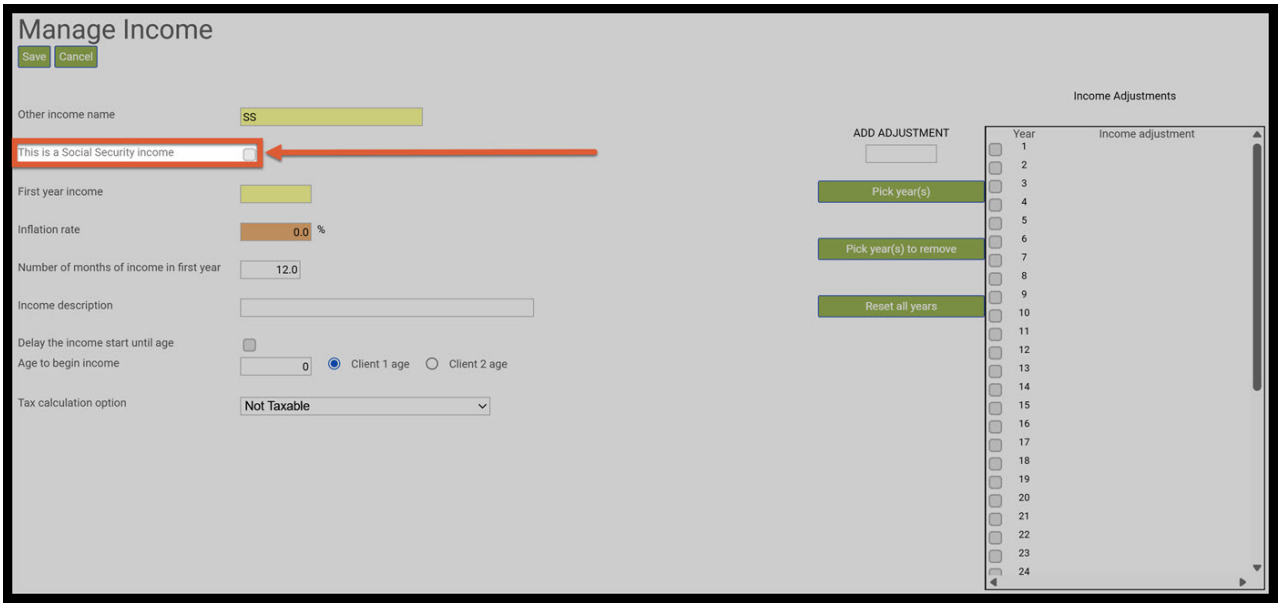
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	Total Income	Target Income	Income Gap	Year
net return	60	3.00 %		3.50 %	Jane IRA	4.00 %									
initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal					from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account		Infl Factor		Infl Factor	income to	
w/bonus		1,000,000		750,000		50,000		1,800,000	incomes		2.00 %		2.00 %	target	
end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	150,000	0	150,000	end of 1
end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	153,000	0	153,000	end of 2
end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	156,060	0	156,060	end of 3
end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	159,181	0	159,181	end of 4
end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	162,365	0	162,365	end of 5
end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	165,612	0	165,612	end of 6
end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	168,924	0	168,924	end of 7
end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	172,303	0	172,303	end of 8
end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	75,000	75,000	0	end of 9
end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	76,500	76,500	0	end of 10
end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	78,030	78,030	0	end of 11
end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	79,591	79,591	0	end of 12
end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	81,182	81,182	0	end of 13
end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	82,806	82,806	0	end of 14
end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	84,462	84,462	0	end of 15
end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	86,151	86,151	0	end of 16
end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	87,874	87,874	0	end of 17
end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	89,632	89,632	0	end of 18
end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	91,425	91,425	0	end of 19
end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	93,253	93,253	0	end of 20
			722,381		271,525		12,000		1,005,907		1,287,445	2,293,352	1,005,907	1,287,445	

Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning heading.

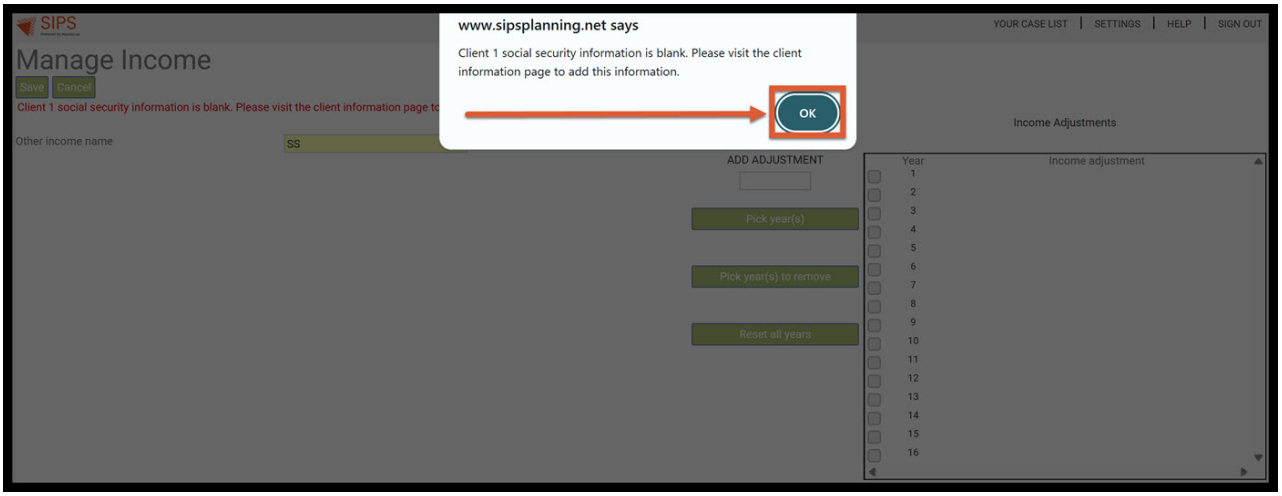


Step 3: Other Income Name: Enter in a title for the column. (SS)

Step 4: This is Social Security Checkbox: Click on the checkbox.

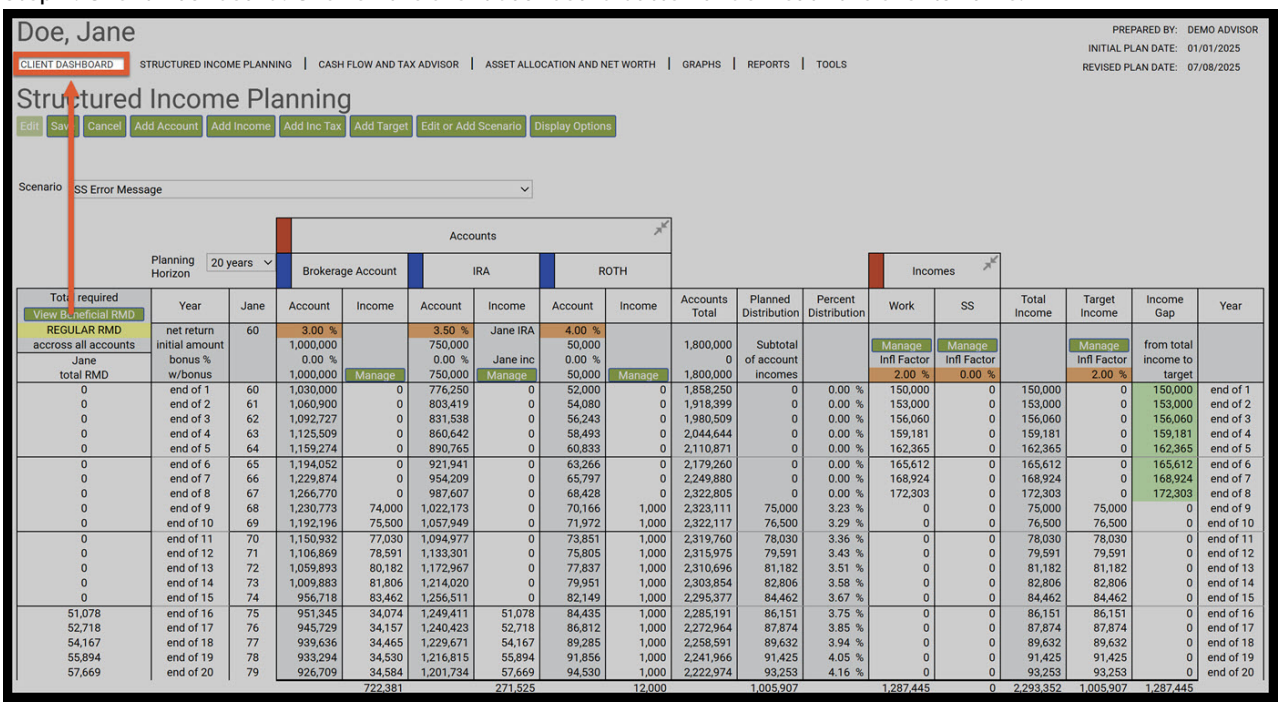


Step 5: Ok for The Error Message: Click the okay button for the error message.

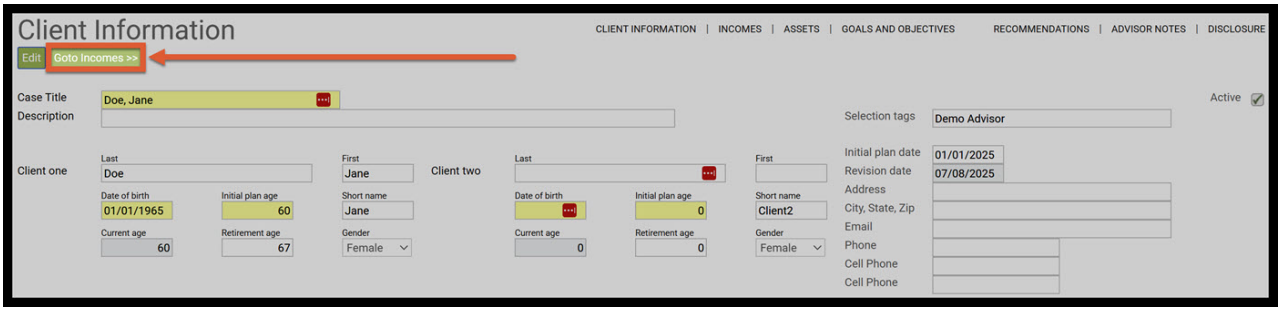


Step 6: Cancel: Click the green cancel button underneath the manage income subheading.

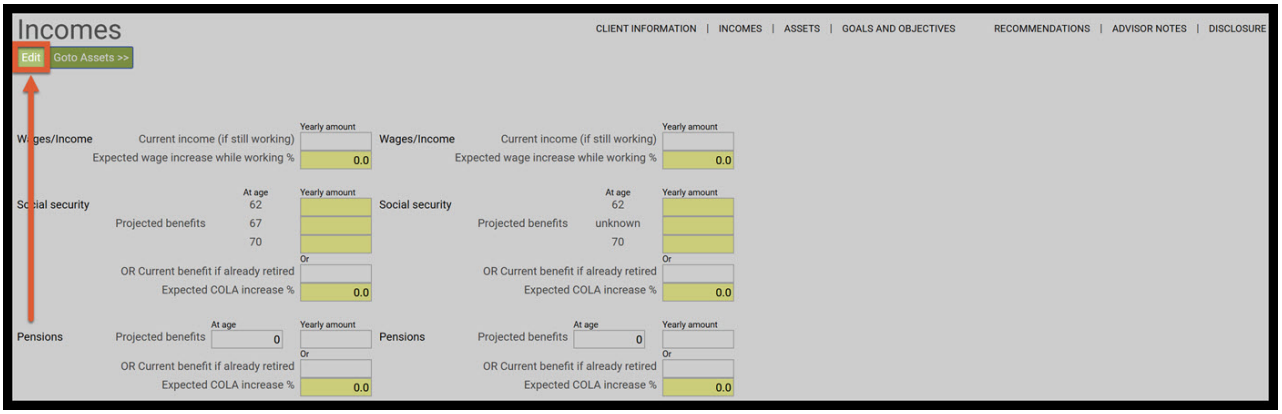
Step 7: Client Dashboard: Click on the client dashboard button underneath the clients name.



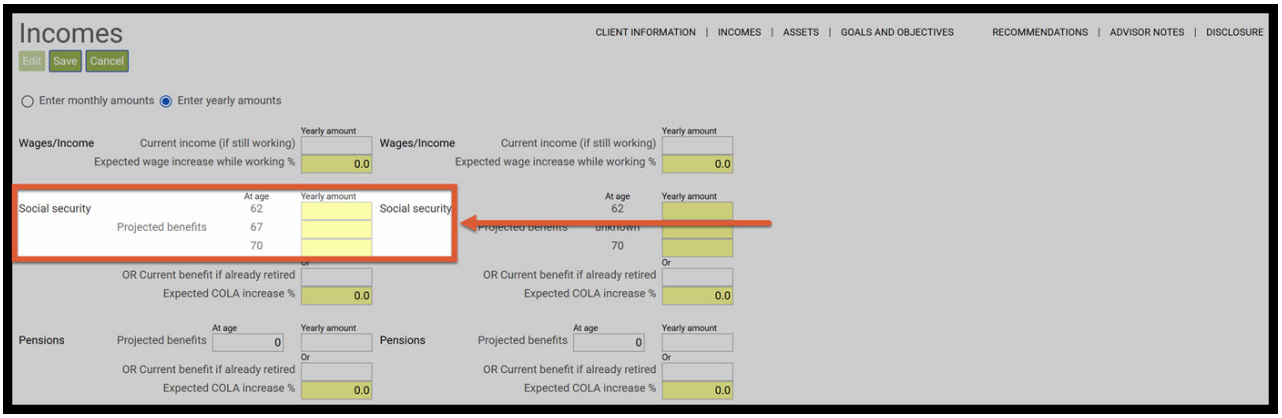
Step 8: GoTo Incomes: Click on the green GoTo Incomes button underneath the Client Information heading.



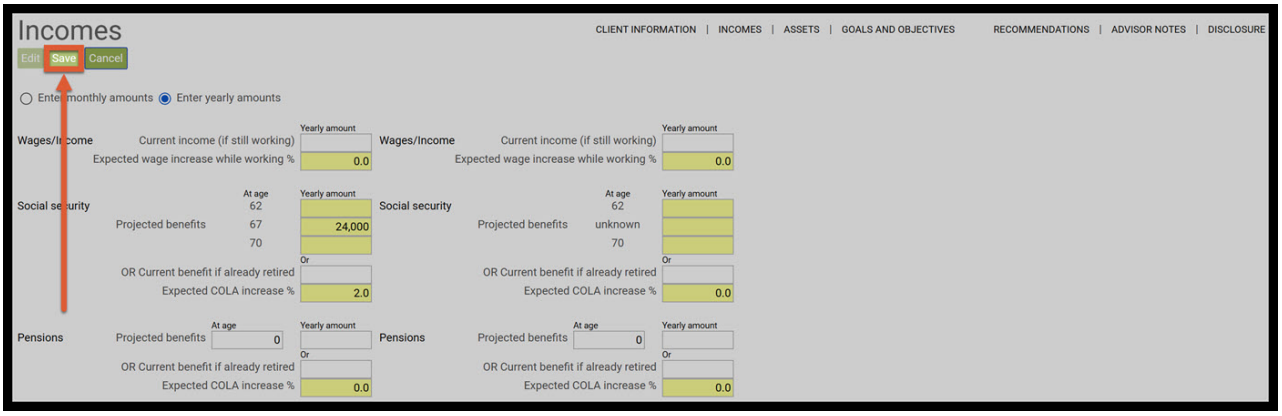
Step 9: Edit: Click on the green edit button underneath the Incomes heading.



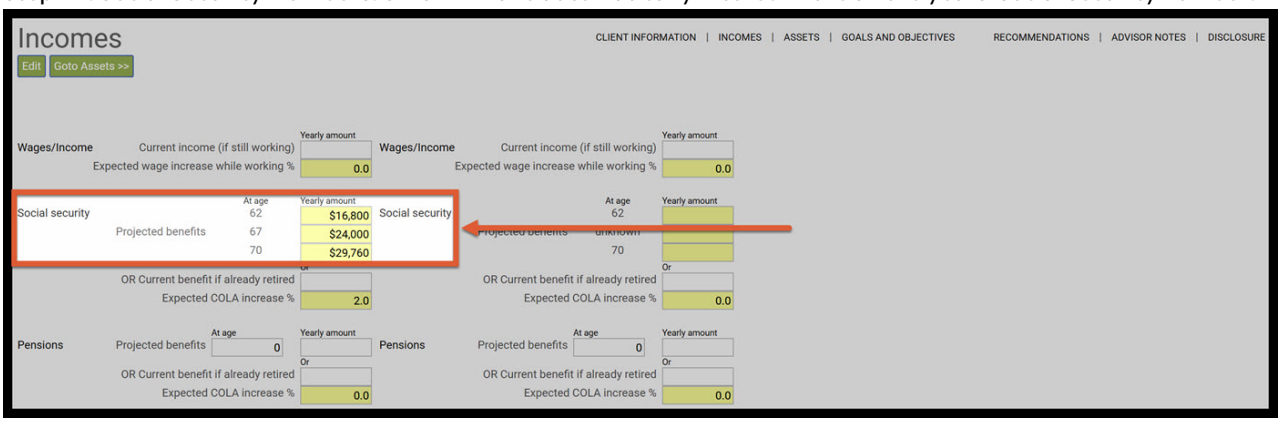
Step 10: Social Security: Enter the Social Security Information. (Client will retire at 67, yearly pay $24,000, 2% COLA)



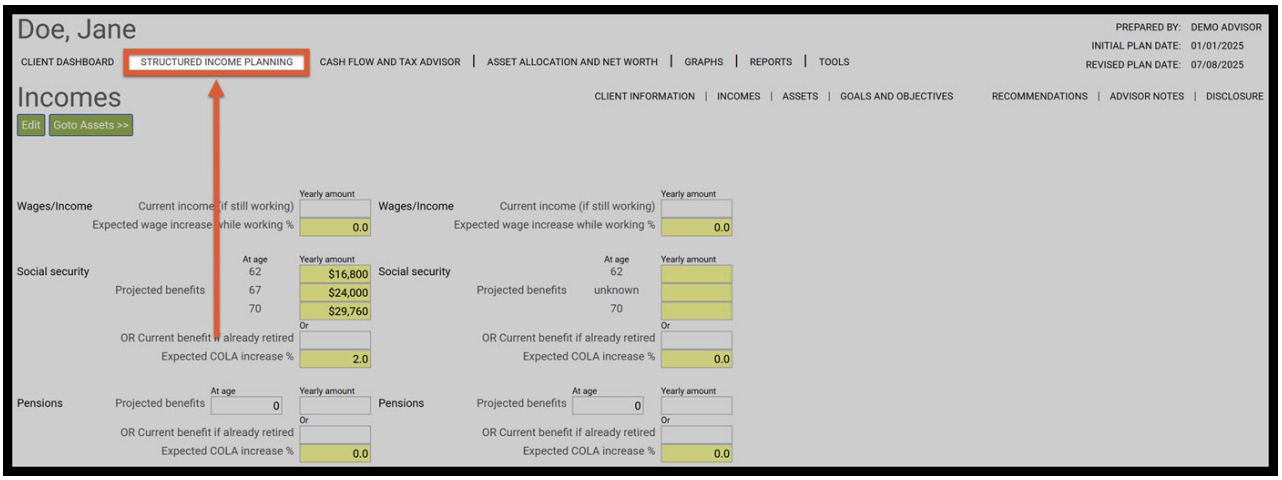
Step 11: Save: Click on the green save button underneath the Incomes heading.



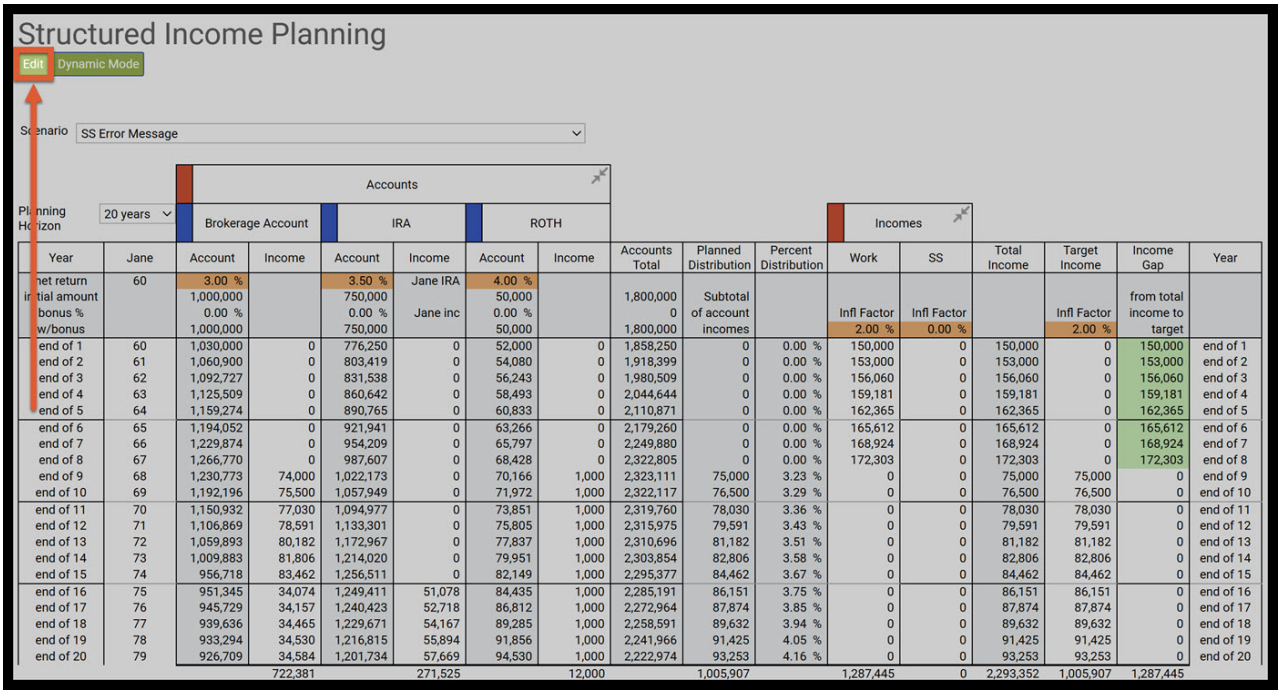
Step 12: Social Security Numbers: SIPS will have automatically filtered in the all the years' social security number.



Step 13: Structured Income Planning: Click on the Structured Income Planning button underneath the client's name.



Step 14: Edit: Click on the green Edit button underneath the Structured Income Planning heading.



Structured Income Planning

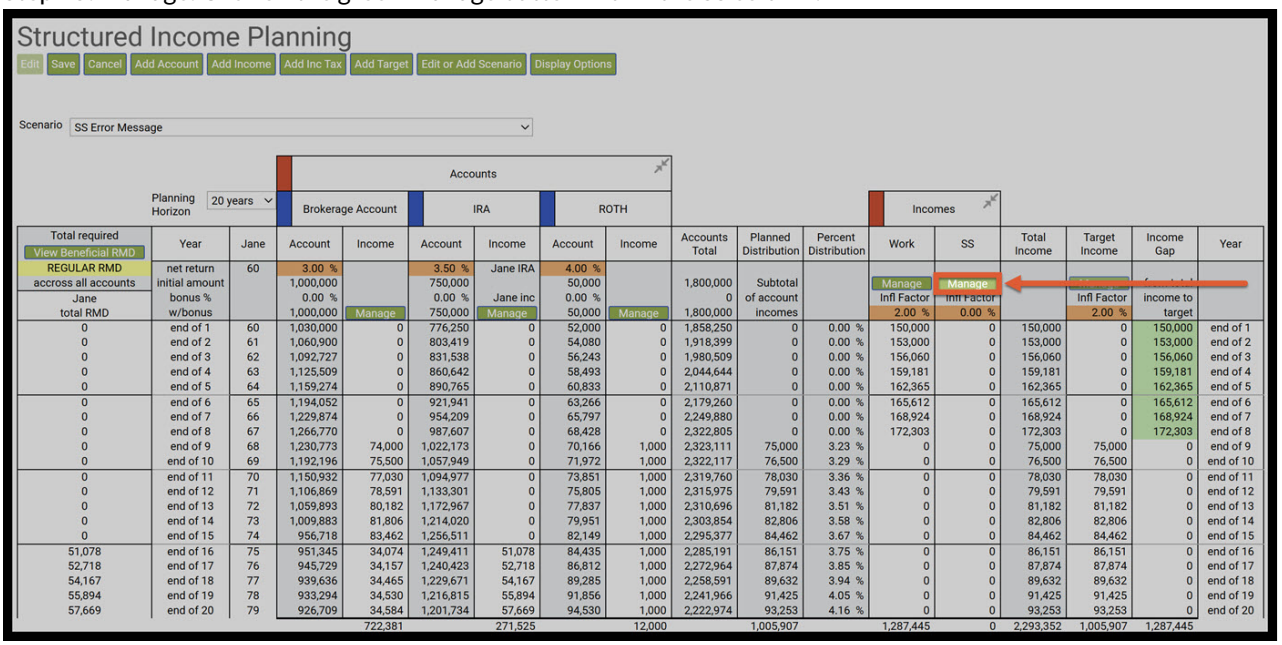
Edit | Dynamic Mode

Scenario: SS Error Message

Planning Horizon: 20 years

		Accounts									Incomes					
		Brokerage Account		IRA		ROTH										
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year
net return	60	3.00 %		3.50 %	Jane IRA	4.00 %										
initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal						from total	
bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account		Infl Factor	Infl Factor		Infl Factor	income to	
w/bonus		1,000,000		750,000		50,000		1,800,000	incomes		2.00 %	0.00 %		2.00 %	target	
end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	0	172,303	0	172,303	end of 8
end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	0	75,000	75,000	0	end of 9
end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	0	76,500	76,500	0	end of 10
end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	0	78,030	78,030	0	end of 11
end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	0	79,591	79,591	0	end of 12
end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	0	81,182	81,182	0	end of 13
end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	0	82,806	82,806	0	end of 14
end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	0	84,462	84,462	0	end of 15
end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	0	86,151	86,151	0	end of 16
end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	0	87,874	87,874	0	end of 17
end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	0	89,632	89,632	0	end of 18
end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	0	91,425	91,425	0	end of 19
end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	0	93,253	93,253	0	end of 20
			722,381		271,525		12,000		1,005,907		1,287,445	0	2,293,352	1,005,907	1,287,445	

Step 15: Manage: Click on the green Manage button within the SS column.



Structured Income Planning

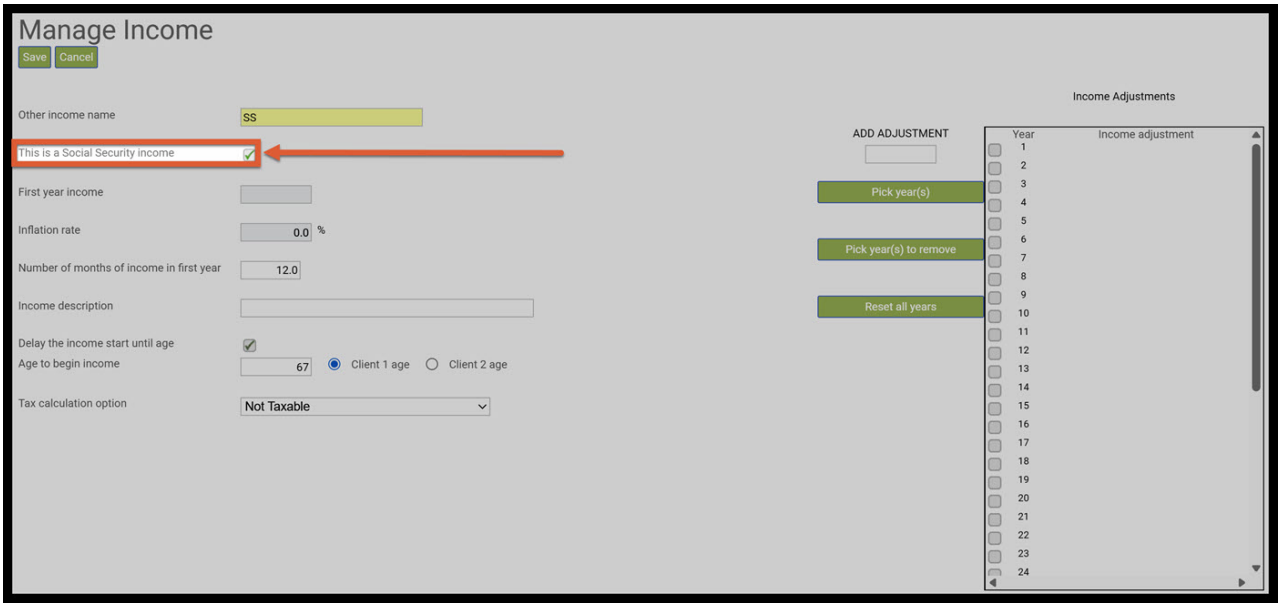
Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario: SS Error Message

Planning Horizon: 20 years

Total required			Accounts									Incomes					
View Beneficial RMD			Brokerage Account		IRA		ROTH										
REGULAR RMD	Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year
accross all accounts	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %										
Jane	initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal		Manage	Manage				
total RMD	bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account		Infl Factor	Infl Factor		Infl Factor	income to	
	w/bonus		1,000,000	Manage	750,000	Manage	50,000	Manage	1,800,000	incomes		2.00 %	0.00 %		2.00 %	target	
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	0	172,303	0	172,303	end of 8
0	end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	0	75,000	75,000	0	end of 9
0	end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	0	76,500	76,500	0	end of 10
0	end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	0	78,030	78,030	0	end of 11
0	end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	0	79,591	79,591	0	end of 12
0	end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	0	81,182	81,182	0	end of 13
0	end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	0	82,806	82,806	0	end of 14
0	end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	0	84,462	84,462	0	end of 15
51,078	end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	0	86,151	86,151	0	end of 16
52,718	end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	0	87,874	87,874	0	end of 17
54,167	end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	0	89,632	89,632	0	end of 18
55,894	end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	0	91,425	91,425	0	end of 19
57,669	end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	0	93,253	93,253	0	end of 20
				722,381		271,525		12,000		1,005,907		1,287,445	0	2,293,352	1,005,907	1,287,445	

Step 16: This is Social Security Checkbox: Unclick the 'This is Social Security Income' Checkbox.

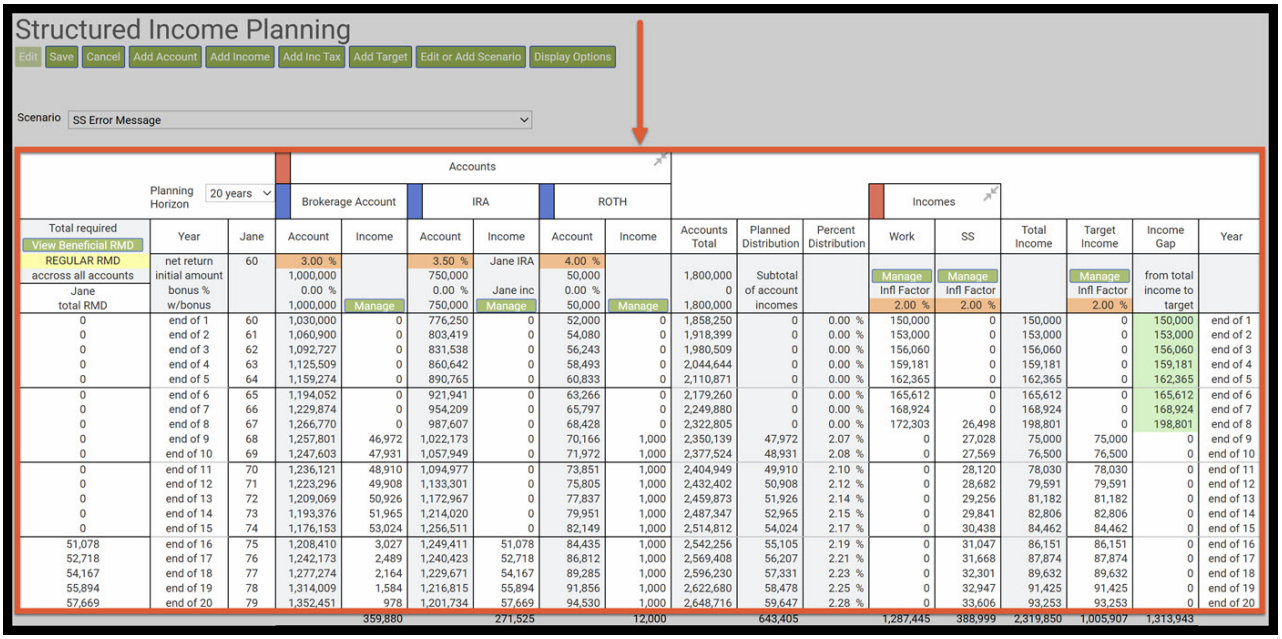


Step 17: This is Social Security Checkbox: Click on the 'This is Social Security Income' Checkbox. The information that was put in on the Incomes page in the Client Dashboard should automatically be filtered in after you click on the checkbox.

Step 18: Tax Calculation Option: SIPS should have automatically changed the tax calculation option to Social Security (Line 6a of the tax form).

Step 19: Save: Click on the green Save button underneath the Manage Income heading.

Step 20: Structured Income Planning Page: You will automatically be taken back to the Structured Income Planning Page.



Structured Income Planning

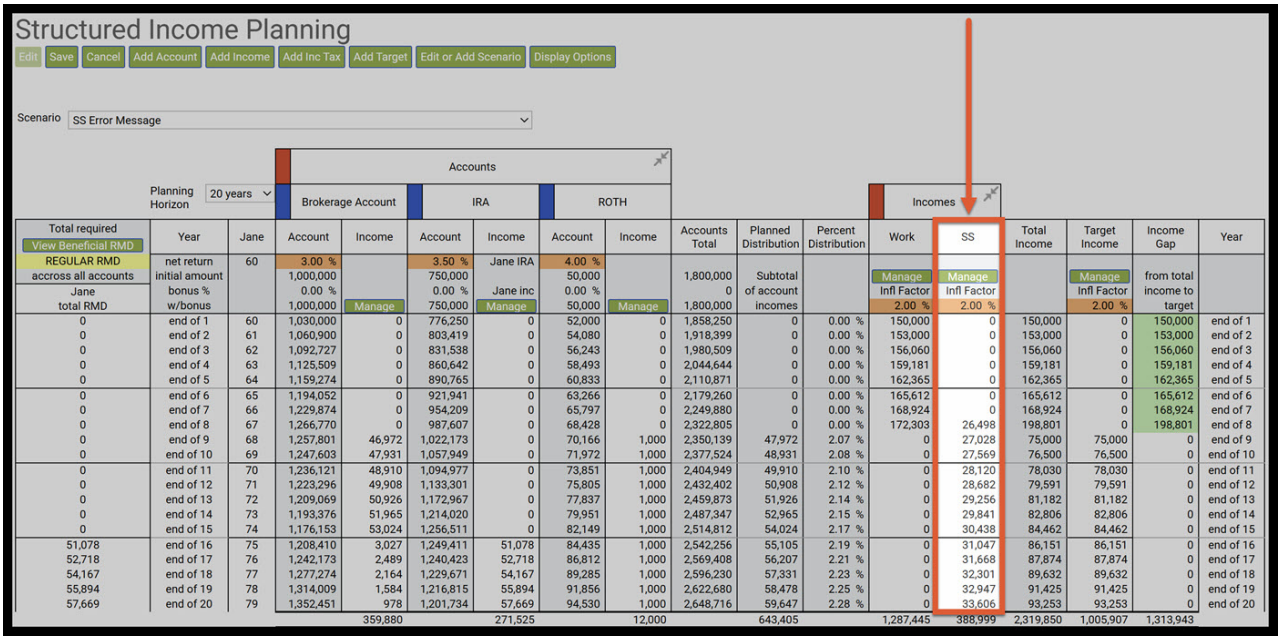
Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario: SS Error Message

Planning Horizon: 20 years

Total required / View Beneficial RMD	Year	Jane	Accounts: Brokerage Account Account	Brokerage Account Income	IRA Account	IRA Income	ROTH Account	ROTH Income	Accounts Total	Planned Distribution	Percent Distribution	Incomes: Work	Incomes: SS	Total Income	Target Income	Income Gap	Year
REGULAR RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %										
accross all accounts	initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal		Manage	Manage		Manage	from total	
Jane	bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account		Infl Factor	Infl Factor		Infl Factor	income to	
total RMD	w/bonus		1,000,000	Manage	750,000	Manage	50,000	Manage	1,800,000	incomes		2.00 %	2.00 %		2.00 %	target	
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	26,498	198,801	0	198,801	end of 8
0	end of 9	68	1,257,801	46,972	1,022,173	0	70,166	1,000	2,350,139	47,972	2.07 %	0	27,028	75,000	75,000	0	end of 9
0	end of 10	69	1,247,603	47,931	1,057,949	0	71,972	1,000	2,377,524	48,931	2.08 %	0	27,569	76,500	76,500	0	end of 10
0	end of 11	70	1,236,121	48,910	1,094,977	0	73,851	1,000	2,404,949	49,910	2.10 %	0	28,120	78,030	78,030	0	end of 11
0	end of 12	71	1,223,296	49,908	1,133,301	0	75,805	1,000	2,432,402	50,908	2.12 %	0	28,682	79,591	79,591	0	end of 12
0	end of 13	72	1,209,069	50,926	1,172,967	0	77,837	1,000	2,459,873	51,926	2.14 %	0	29,256	81,182	81,182	0	end of 13
0	end of 14	73	1,193,376	51,965	1,214,020	0	79,951	1,000	2,487,347	52,965	2.15 %	0	29,841	82,806	82,806	0	end of 14
0	end of 15	74	1,176,153	53,024	1,256,511	0	82,149	1,000	2,514,812	54,024	2.17 %	0	30,438	84,462	84,462	0	end of 15
51,078	end of 16	75	1,208,410	3,027	1,249,411	51,078	84,435	1,000	2,542,256	55,105	2.19 %	0	31,047	86,151	86,151	0	end of 16
52,718	end of 17	76	1,242,173	2,489	1,240,423	52,718	86,812	1,000	2,569,408	56,207	2.21 %	0	31,668	87,874	87,874	0	end of 17
54,167	end of 18	77	1,277,274	2,164	1,229,671	54,167	89,285	1,000	2,596,230	57,331	2.23 %	0	32,301	89,632	89,632	0	end of 18
55,894	end of 19	78	1,314,009	1,584	1,216,815	55,894	91,856	1,000	2,622,680	58,478	2.25 %	0	32,947	91,425	91,425	0	end of 19
57,669	end of 20	79	1,352,451	978	1,201,734	57,669	94,530	1,000	2,648,716	59,647	2.28 %	0	33,606	93,253	93,253	0	end of 20
				359,880		271,525		12,000		643,405		1,287,445	388,999	2,319,850	1,005,907	1,313,943	

Step 21: SS Column: A new column will automatically be within the plan, the SS column displaying the correct amounts.



Structured Income Planning

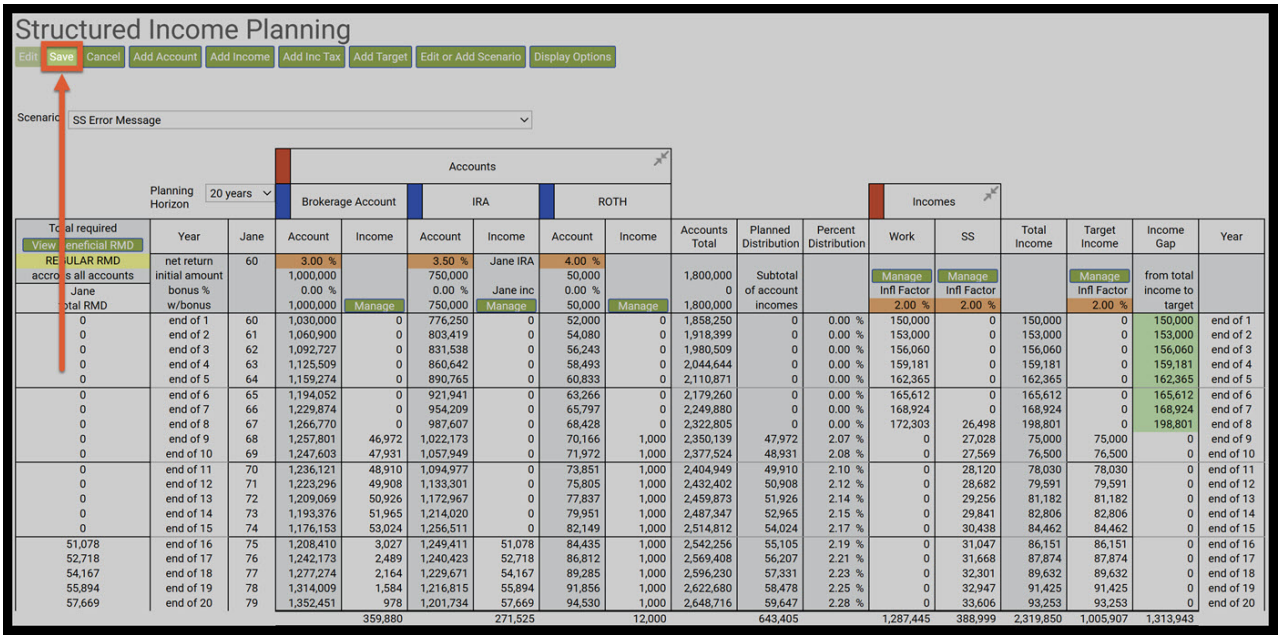
Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario: SS Error Message

Planning Horizon: 20 years

Total required / View Beneficial RMD	Year	Jane	Accounts: Brokerage Account Account	Brokerage Account Income	IRA Account	IRA Income	ROTH Account	ROTH Income	Accounts Total	Planned Distribution	Percent Distribution	Incomes: Work	Incomes: SS	Total Income	Target Income	Income Gap	Year
REGULAR RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %										
accross all accounts	initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal		Manage	Manage		Manage	from total	
Jane	bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account		Infl Factor	Infl Factor		Infl Factor	income to	
total RMD	w/bonus		1,000,000	Manage	750,000	Manage	50,000	Manage	1,800,000	incomes		2.00 %	2.00 %		2.00 %	target	
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	26,498	198,801	0	198,801	end of 8
0	end of 9	68	1,257,801	46,972	1,022,173	0	70,166	1,000	2,350,139	47,972	2.07 %	0	27,028	75,000	75,000	0	end of 9
0	end of 10	69	1,247,603	47,931	1,057,949	0	71,972	1,000	2,377,524	48,931	2.08 %	0	27,569	76,500	76,500	0	end of 10
0	end of 11	70	1,236,121	48,910	1,094,977	0	73,851	1,000	2,404,949	49,910	2.10 %	0	28,120	78,030	78,030	0	end of 11
0	end of 12	71	1,223,296	49,908	1,133,301	0	75,805	1,000	2,432,402	50,908	2.12 %	0	28,682	79,591	79,591	0	end of 12
0	end of 13	72	1,209,069	50,926	1,172,967	0	77,837	1,000	2,459,873	51,926	2.14 %	0	29,256	81,182	81,182	0	end of 13
0	end of 14	73	1,193,376	51,965	1,214,020	0	79,951	1,000	2,487,347	52,965	2.15 %	0	29,841	82,806	82,806	0	end of 14
0	end of 15	74	1,176,153	53,024	1,256,511	0	82,149	1,000	2,514,812	54,024	2.17 %	0	30,438	84,462	84,462	0	end of 15
51,078	end of 16	75	1,208,410	3,027	1,249,411	51,078	84,435	1,000	2,542,256	55,105	2.19 %	0	31,047	86,151	86,151	0	end of 16
52,718	end of 17	76	1,242,173	2,489	1,240,423	52,718	86,812	1,000	2,569,408	56,207	2.21 %	0	31,668	87,874	87,874	0	end of 17
54,167	end of 18	77	1,277,274	2,164	1,229,671	54,167	89,285	1,000	2,596,230	57,331	2.23 %	0	32,301	89,632	89,632	0	end of 18
55,894	end of 19	78	1,314,009	1,584	1,216,815	55,894	91,856	1,000	2,622,680	58,478	2.25 %	0	32,947	91,425	91,425	0	end of 19
57,669	end of 20	79	1,352,451	978	1,201,734	57,669	94,530	1,000	2,648,716	59,647	2.28 %	0	33,606	93,253	93,253	0	end of 20
				359,880		271,525		12,000		643,405		1,287,445	388,999	2,319,850	1,005,907	1,313,943	

Step 22: Save: Click on the green Save button underneath the Structured Income Planning heading.



Structured Income Planning

Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario: SS Error Message

Planning Horizon: 20 years

Total required	Year	Jane	Accounts: Brokerage Account		Accounts: IRA		Accounts: ROTH		Accounts Total	Planned Distribution	Percent Distribution	Incomes: Work	Incomes: SS	Total Income	Target Income	Income Gap	Year
View beneficial RMD																	
REGULAR RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %										
accrors all accounts	initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal		Manage	Manage		Manage		
Jane	bonus %		0.00 %		0.00 %	Jane inc	0.00 %		0	of account		Infl Factor	Infl Factor		Infl Factor	from total	
otal RMD	w/bonus		1,000,000	Manage	750,000	Manage	50,000	Manage	1,800,000	incomes		2.00 %	2.00 %		2.00 %	income to	
																target	
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	26,498	198,801	0	198,801	end of 8
0	end of 9	68	1,257,801	46,972	1,022,173	0	70,166	1,000	2,350,139	47,972	2.07 %	0	27,028	75,000	75,000	0	end of 9
0	end of 10	69	1,247,603	47,931	1,057,949	0	71,972	1,000	2,377,524	48,931	2.08 %	0	27,569	76,500	76,500	0	end of 10
0	end of 11	70	1,236,121	48,910	1,094,977	0	73,851	1,000	2,404,949	49,910	2.10 %	0	28,120	78,030	78,030	0	end of 11
0	end of 12	71	1,223,296	49,908	1,133,301	0	75,805	1,000	2,432,402	50,908	2.12 %	0	28,682	79,591	79,591	0	end of 12
0	end of 13	72	1,209,069	50,926	1,172,967	0	77,837	1,000	2,459,873	51,926	2.14 %	0	29,256	81,182	81,182	0	end of 13
0	end of 14	73	1,193,376	51,965	1,214,020	0	79,951	1,000	2,487,347	52,965	2.15 %	0	29,841	82,806	82,806	0	end of 14
0	end of 15	74	1,176,153	53,024	1,256,511	0	82,149	1,000	2,514,812	54,024	2.17 %	0	30,438	84,462	84,462	0	end of 15
51,078	end of 16	75	1,208,410	3,027	1,249,411	51,078	84,435	1,000	2,542,256	55,105	2.19 %	0	31,047	86,151	86,151	0	end of 16
52,718	end of 17	76	1,242,173	2,489	1,240,423	52,718	86,812	1,000	2,569,408	56,207	2.21 %	0	31,668	87,874	87,874	0	end of 17
54,167	end of 18	77	1,277,274	2,164	1,229,671	54,167	89,285	1,000	2,596,230	57,331	2.23 %	0	32,301	89,632	89,632	0	end of 18
55,894	end of 19	78	1,314,009	1,584	1,216,815	55,894	91,856	1,000	2,622,680	58,478	2.25 %	0	32,947	91,425	91,425	0	end of 19
57,669	end of 20	79	1,352,451	978	1,201,734	57,669	94,530	1,000	2,648,716	59,647	2.28 %	0	33,606	93,253	93,253	0	end of 20
				359,880		271,525		12,000		643,405		1,287,445	388,999	2,319,850	1,005,907	1,313,943	

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.