

View Comparison Function on the Asset Allocation and Net Worth Landing Page

09/29/2025 2:23 pm EDT

On the Asset Allocation and Net Worth page, you can easily compare two different scenarios if you'd like to compare different asset allocation strategies. The View Comparison button allows you to compare two different scenarios side by side. If you are investigating a certain planning strategy you can see the difference using the pie chart visual. Both of the visual aids are at the starting point of the plan.

Below are two different hypothetical scenarios that will be compared side by side. The first hypothetical scenario that is located on the left hand side of the screen is the hypothetical example used in the Asset Allocation and Net Worth article. The 2nd scenario located on the right hand side of the screen. Below are the breakdown of the asset allocation numbers:

Scenario from the Asset Allocation and Net Worth Article:

- Brokerage Account: \$3,000,000 Asset Allocation: Aggressive (Red); Hypothetical return 5%
- ROTH 401 (k): \$1,500,00 Asset Allocation: Moderate (Yellow); Hypothetical return 4%
- IRA: \$250,000 Asset Allocation: Conservative (Blue); Hypothetical return 2%

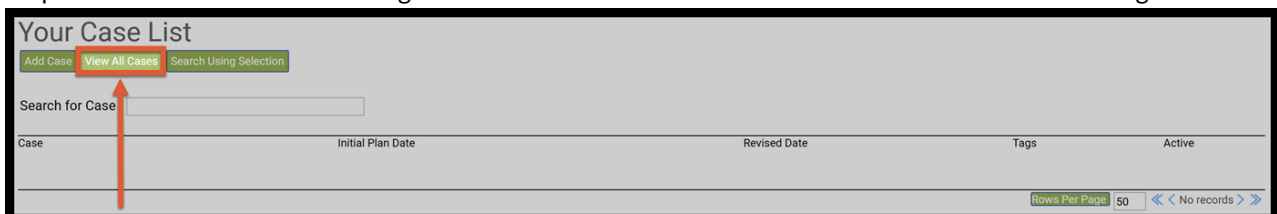
Scenario used for comparison:

- Brokerage Account: \$2,500,000 Asset Allocation: Conservative (Blue) Hypothetical return 2%
- HSA (Health Savings Account: \$100,000 Asset Allocation: Conservative (Blue) Hypothetical return 2%
- ROTH 401 (k): \$1,000,000 Asset Allocation: Moderate (Yellow) Hypothetical return 3%
- IRA: \$125,000 Asset Allocation; Aggressive (Red) Hypothetical return 5%

To learn about comparing different asset allocation and net worths and graphs see articles:

- [Asset Allocation and Net Worth](#)
- [View Comparison Function on the Asset Allocation and Net Worth Landing Page](#)
- [Projected Account Value Graph](#)
- [Planned Yearly Income Graph](#)

Step 1: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



Step 2: Case: Click on the Client account you would like to open. (John Doe)

Your Case List

[Add Case](#)
[View All Cases](#)
[Search Using Selection](#)

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
Doe, John	01/01/2025	08/12/2025	Demo Advisor	<input checked="" type="checkbox"/> Del
			Demo Advisor	<input checked="" type="checkbox"/> Del
			Demo Advisor	<input checked="" type="checkbox"/> Del

[Rows Per Page](#) 50
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[Page 1 of 1](#)
[>>](#)

Step 3: Asset Allocation and Net Worth: Click on the Asset Allocation and Net Worth heading underneath the Clients name.

Doe, John

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: 09/09/2025

Client Information

[Edit](#)
[Goto Incomes >>](#)

Case Title

Doe, John

Description

Client one

Last

Doe

First

John

Date of birth

01/01/1963

Initial plan age

62

Current age

62

Retirement age

70

Short name

John

Gender

Male

Client two

Last

First

Date of birth

Initial plan age

0

Current age

0

Retirement age

0

Short name

Client2

Gender

Female

Selection tags

Demo Advisor

Initial plan date

01/01/2025

Revision date

09/09/2025

Address

City, State, Zip

Email

Phone

Cell Phone

Cell Phone

Active

☒

Step 4: View Comparison: Click on the green View Comparison button under the Asset Allocation and Net Worth subheading.

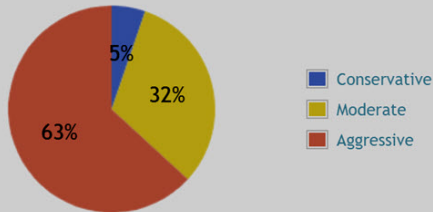
Doe, John

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Asset Allocation and Net Worth

[View Comparison](#)

Scenario



Your overall risk level for this scenario is Moderately Aggressive

Monetary Assets

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
Brokerage Account	John	NQ	Aggr	Aggressive	\$3,000,000
ROTH 401(k)	John	Roth	Mod	Moderate	\$1,500,000
IRA	John	IRA	Cons	Conservative	\$250,000
Total					\$4,750,000

Major Assets

Description	Value	Amount owed	Net
Home	\$500,000		\$500,000
RV	\$100,000		\$100,000
Subtotal			\$600,000

Summary

Your Asset Allocation and Net Worth has a total net worth of \$5,350,000

Step 5: Scenario: Use the down caret arrow to select the correct scenario if the default is incorrect.

Doe, John

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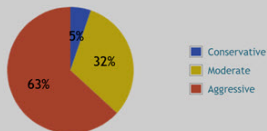
PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 09/09/2025

Asset Allocation and Net Worth

[Hide Comparison](#)

Scenario

Compare



Your overall risk level for this scenario is Moderately Aggressive

Monetary Assets

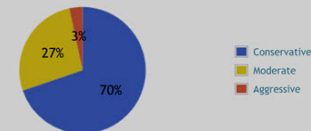
Description	Owner	Tax Qual	Risk Level	Allocation	Balance
Brokerage Account	John	NQ	Aggr	Aggressive	\$3,000,000
ROTH 401(k)	John	Roth	Mod	Moderate	\$1,500,000
IRA	John	IRA	Cons	Conservative	\$250,000
Total					\$4,750,000

Major Assets

Description	Value	Amount owed	Net
Home	\$500,000		\$500,000
RV	\$100,000		\$100,000
Subtotal			\$600,000

Summary

Your Asset Allocation and Net Worth has a total net worth of \$5,350,000



Your overall risk level for this scenario is Moderately Conservative

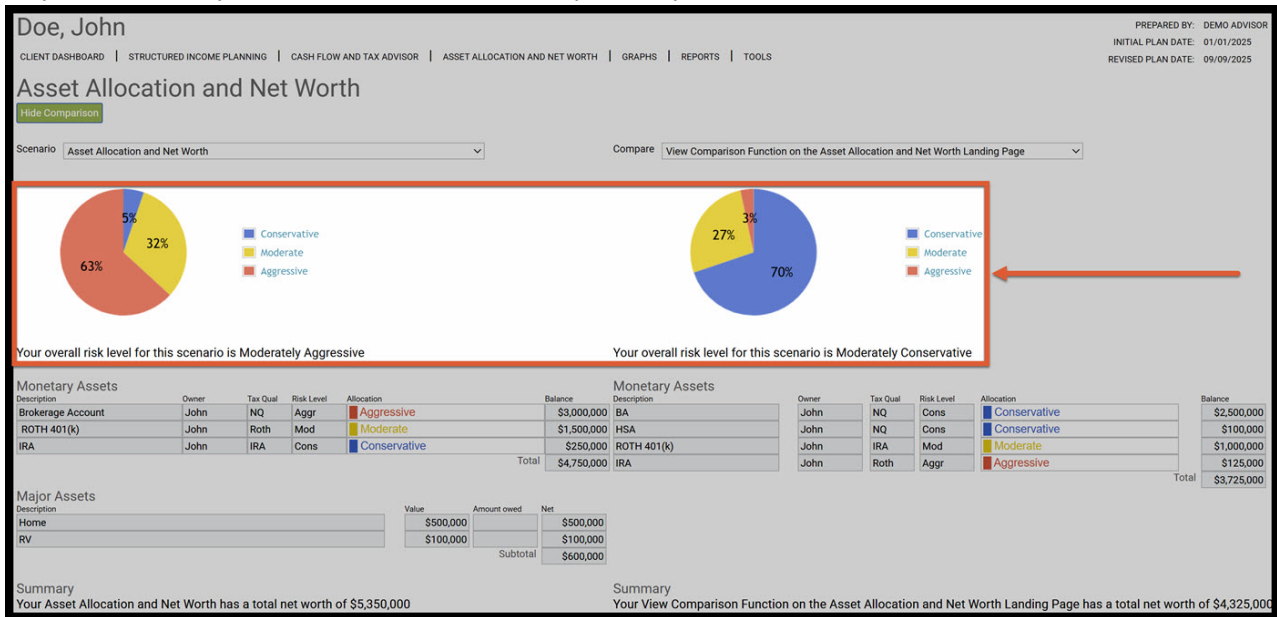
Monetary Assets

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
BA	John	NQ	Cons	Conservative	\$2,500,000
HSA	John	NQ	Cons	Conservative	\$100,000
ROTH 401(k)	John	IRA	Mod	Moderate	\$1,000,000
IRA	John	Roth	Aggr	Aggressive	\$125,000
Total					\$3,725,000

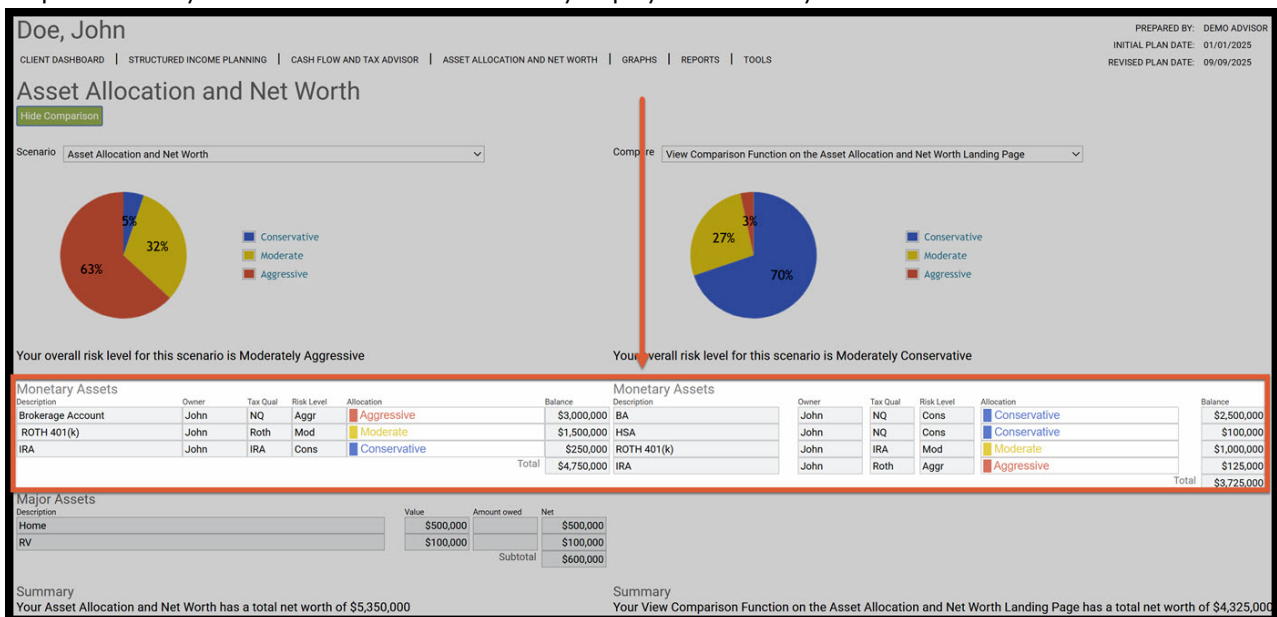
Summary

Your View Comparison Function on the Asset Allocation and Net Worth Landing Page has a total net worth of \$4,325,000

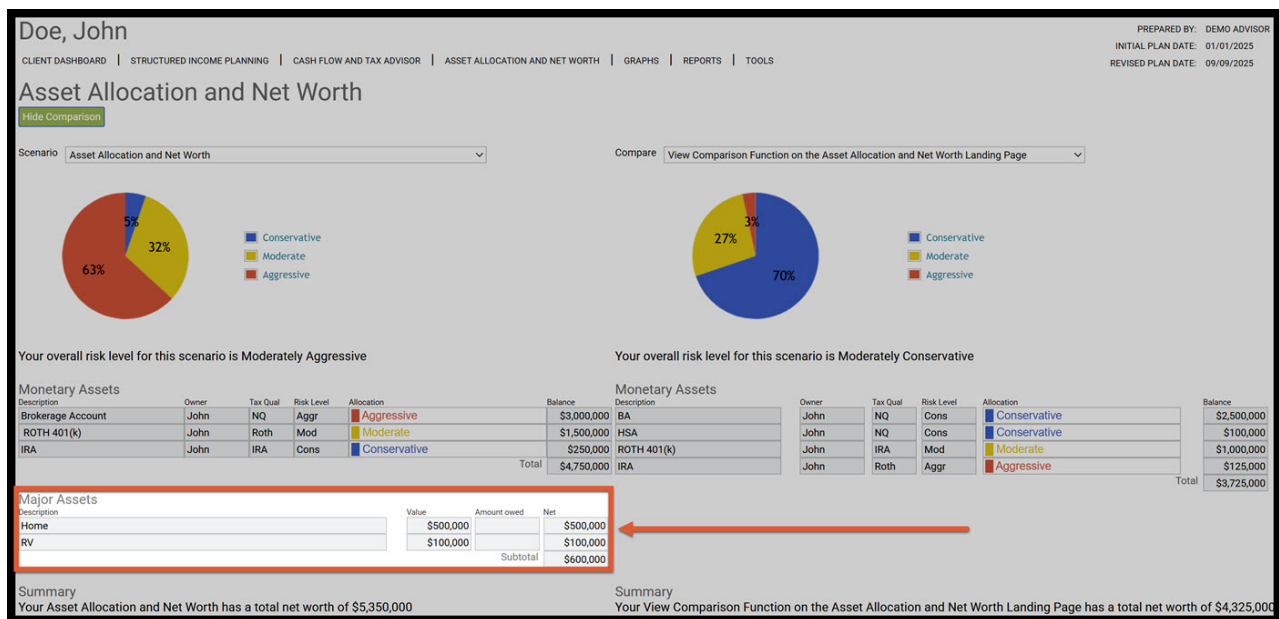
Step 6: Scenario Explanation: SIPS will automatically show a pie chart and state what the asset allocation is.



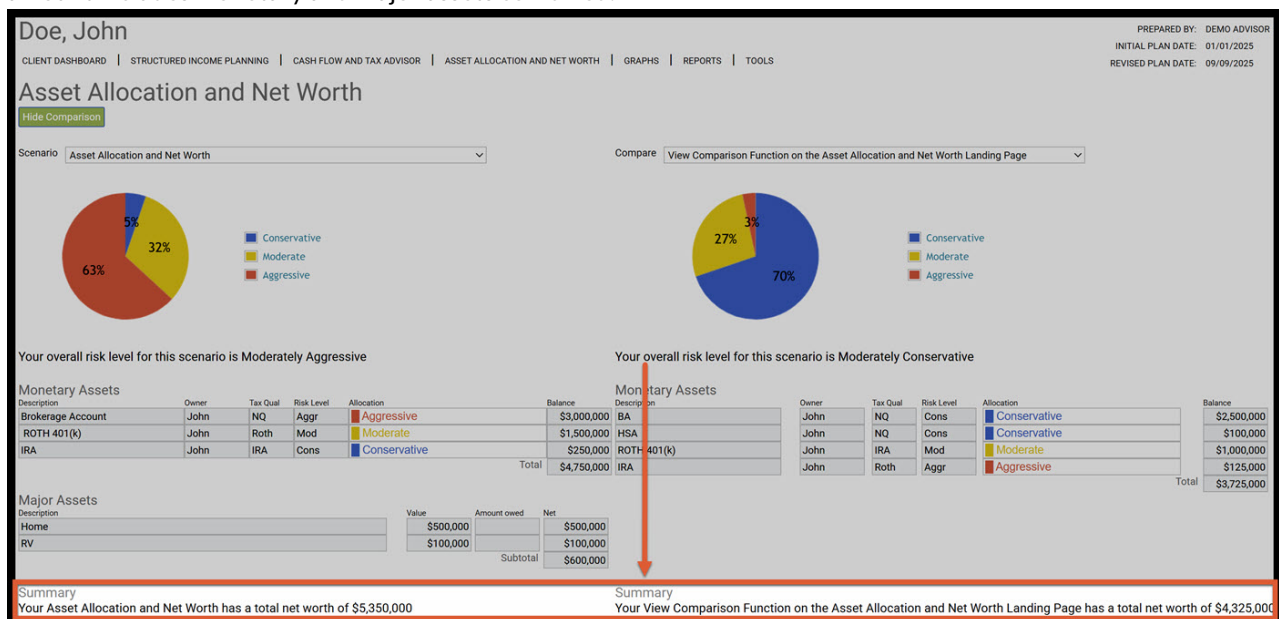
Step 7: Monetary Assets: SIPS should automatically display the monetary assets.



Step 8: Major Assets: These non-spendable assets are listed on the Client Dashboard Assets page under the Property List and the Other Assets & Liabilities. Although they only appear on the left side, SIPS factors them into both scenarios.



Step 9: Summary: SIPS will automatically generate a written summary stating the client's total net worth. This amount includes monetary and major assets combined.



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.