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 startegies. 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:

- Bokerage 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 Assest Allocation: Conservative (Blue); Hypothetical return 2%

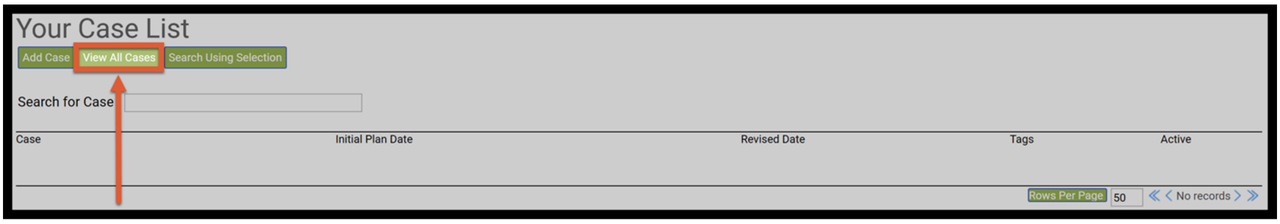
Scenario used for comparison:

- Brokerage Account: $2,500,000 Asset Allocation: Conservatice (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%

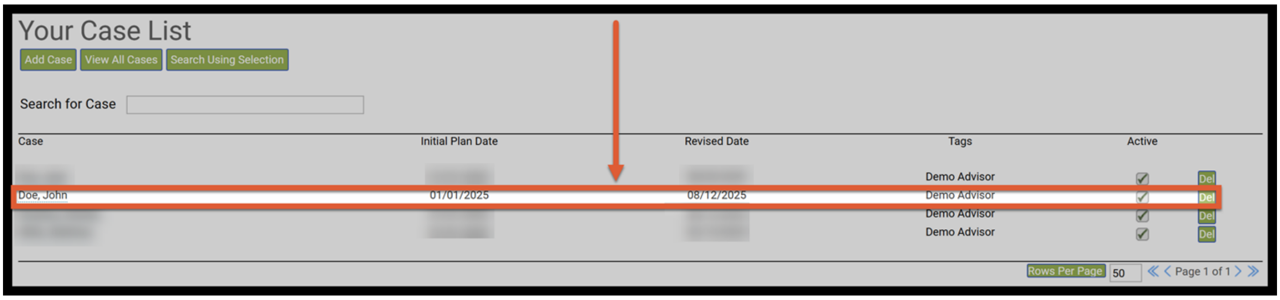
To learn about comparing different asset allocation and net worths and graphs see articles:

- 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

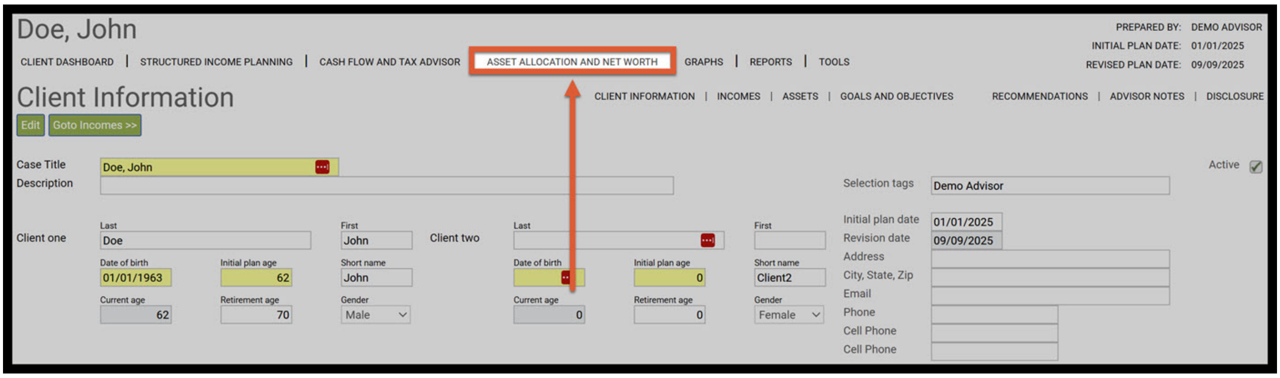
Step 1: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



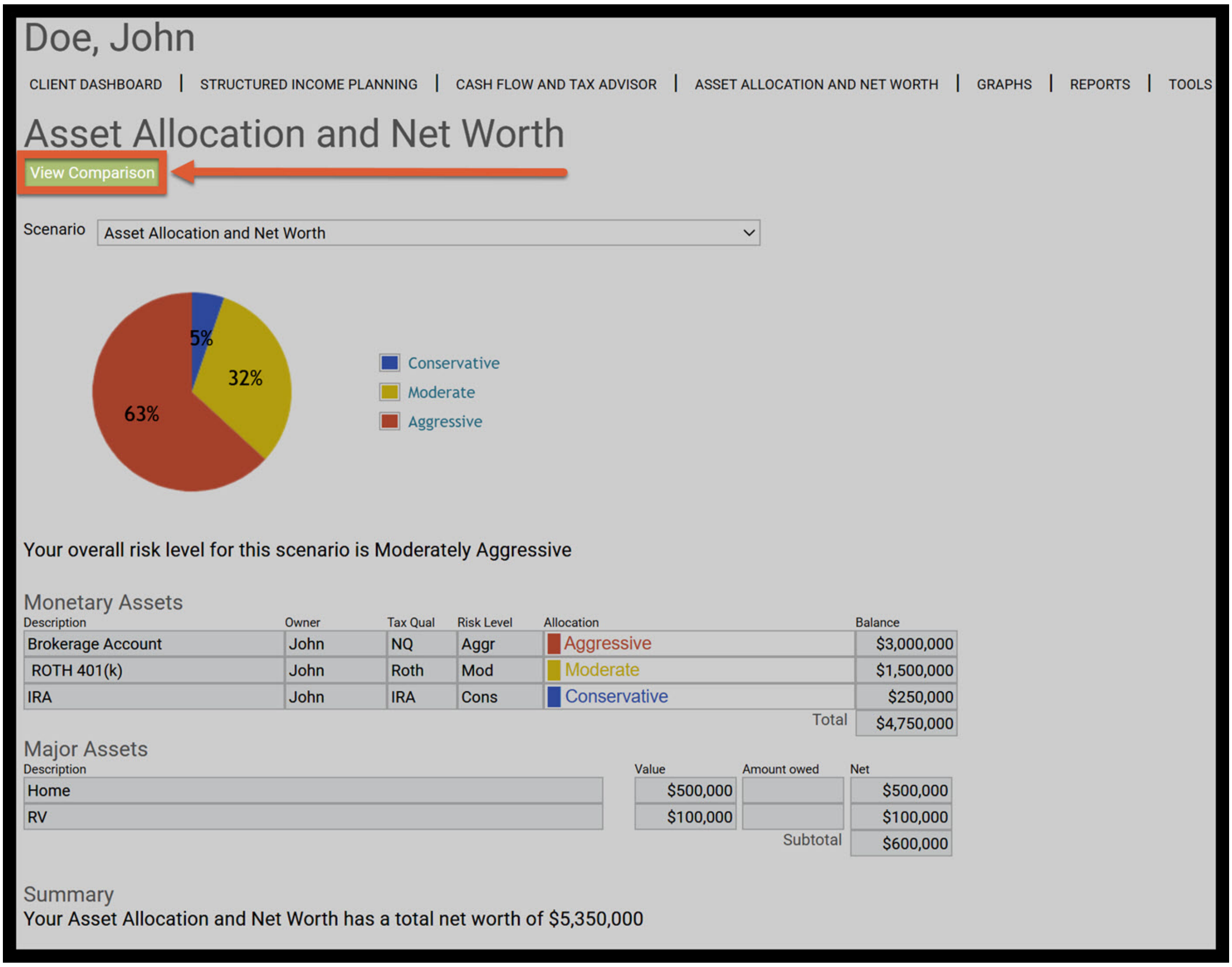
Step 2: Case: Click on the Client account you would like to open. (John Doe)



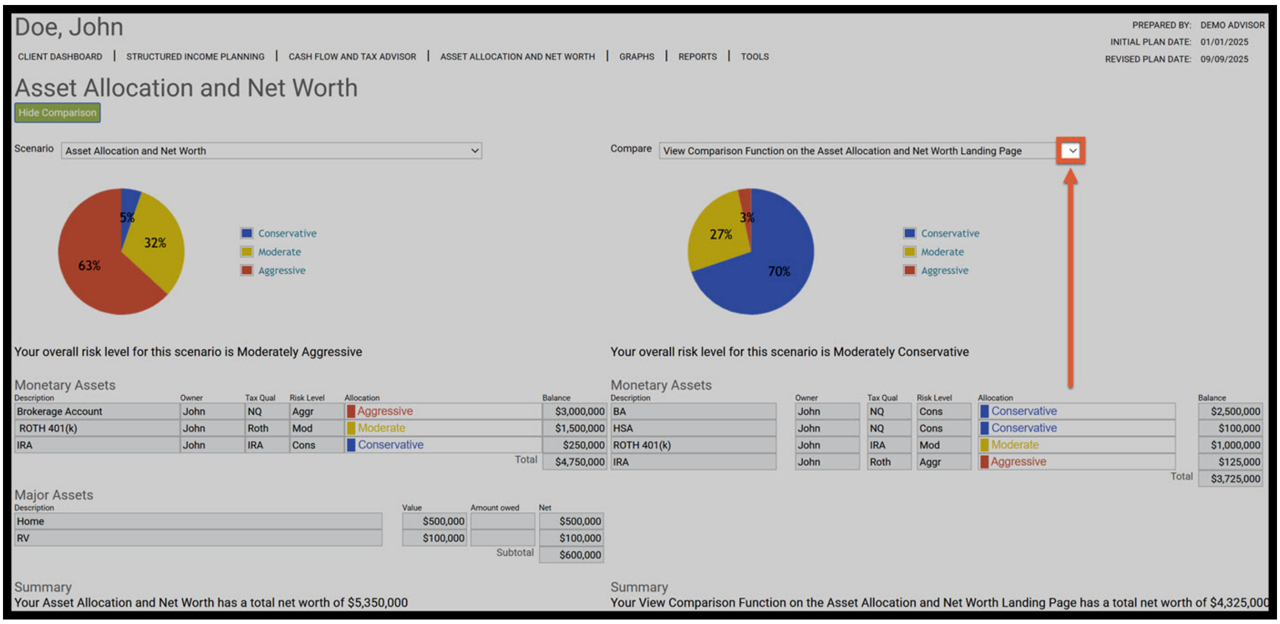
Step 3: Asset Allocation and Net Worth: Click on the Asset Allocation and Net Worth heading underneath the Clients name.



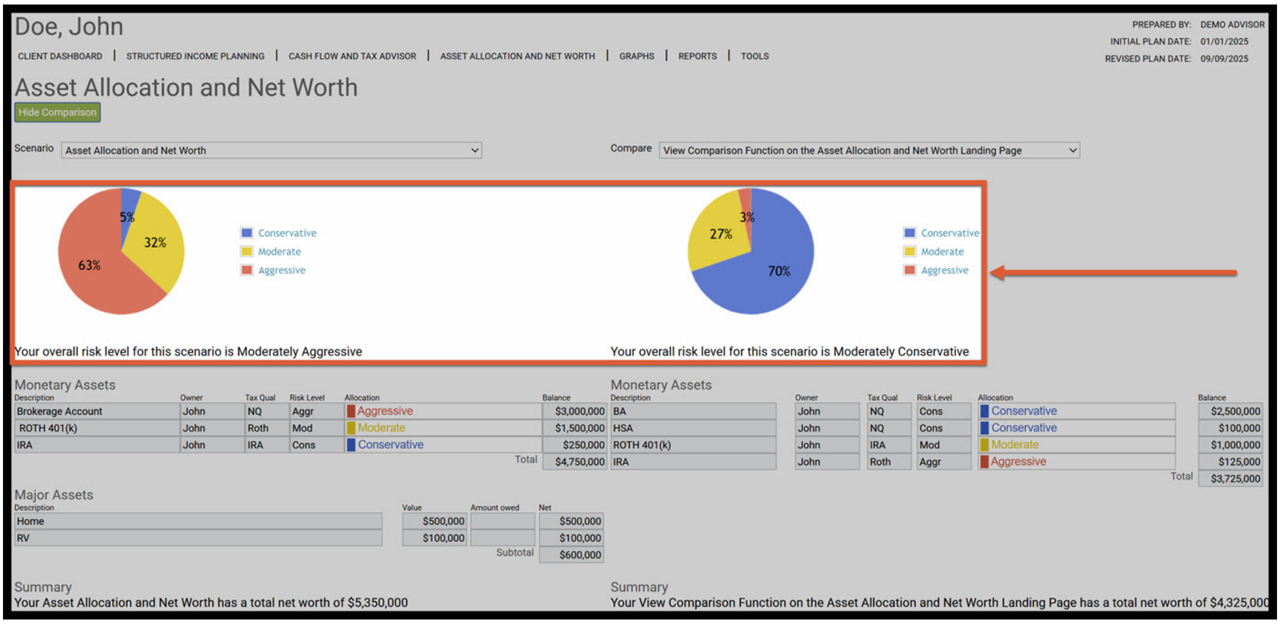
Step 4: View Comparison: Click on the green View Comparison button under the Asset Allocation and Net Worth subheading.



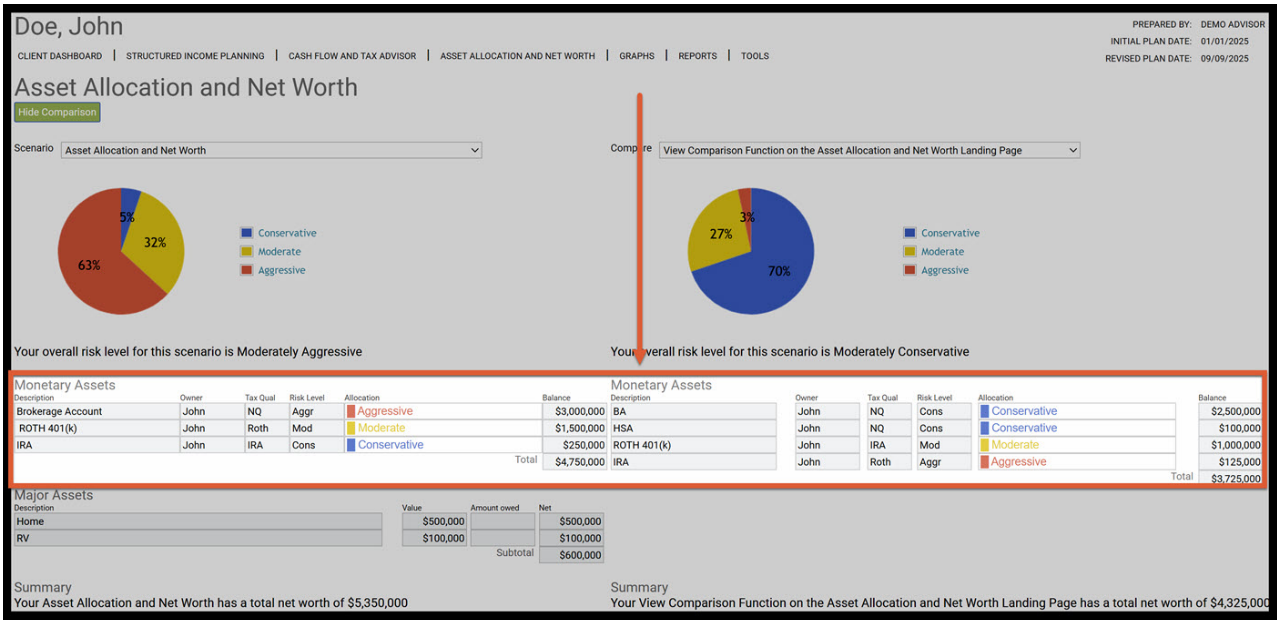
Step 5: Scenario: Use the down caret arrow to select the correct scenario if the default is incorrect.



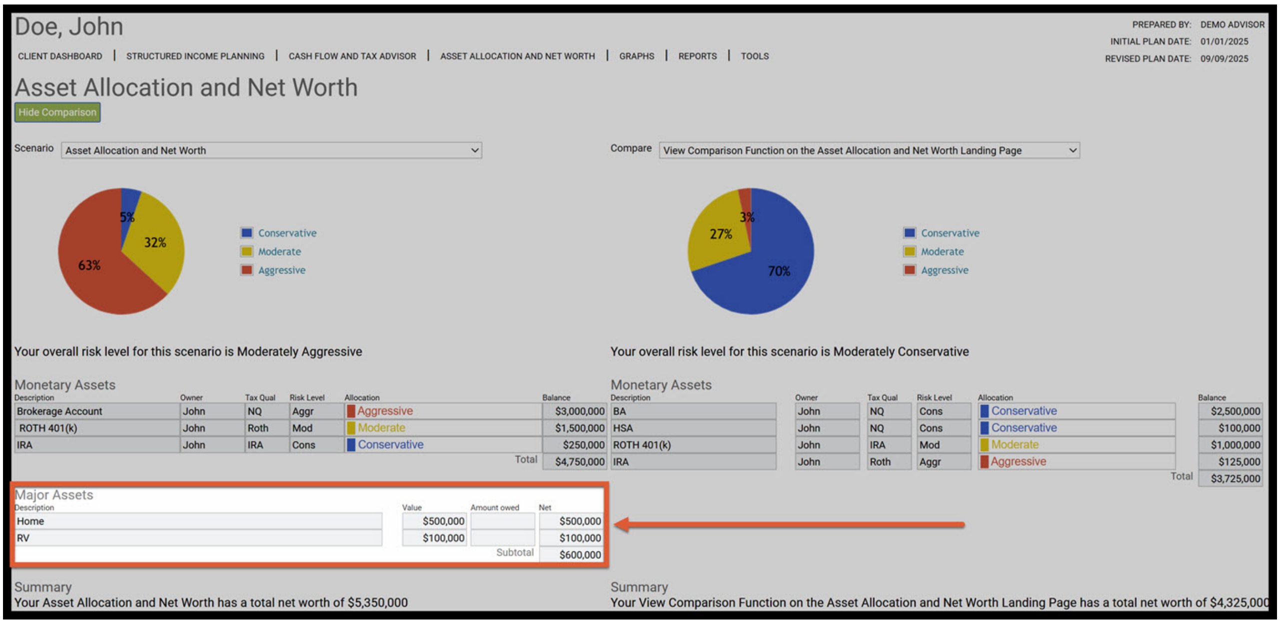
Step 6: Scenario Explanation: SIPS will automatically show a pie chart and state what the asset allocation is.



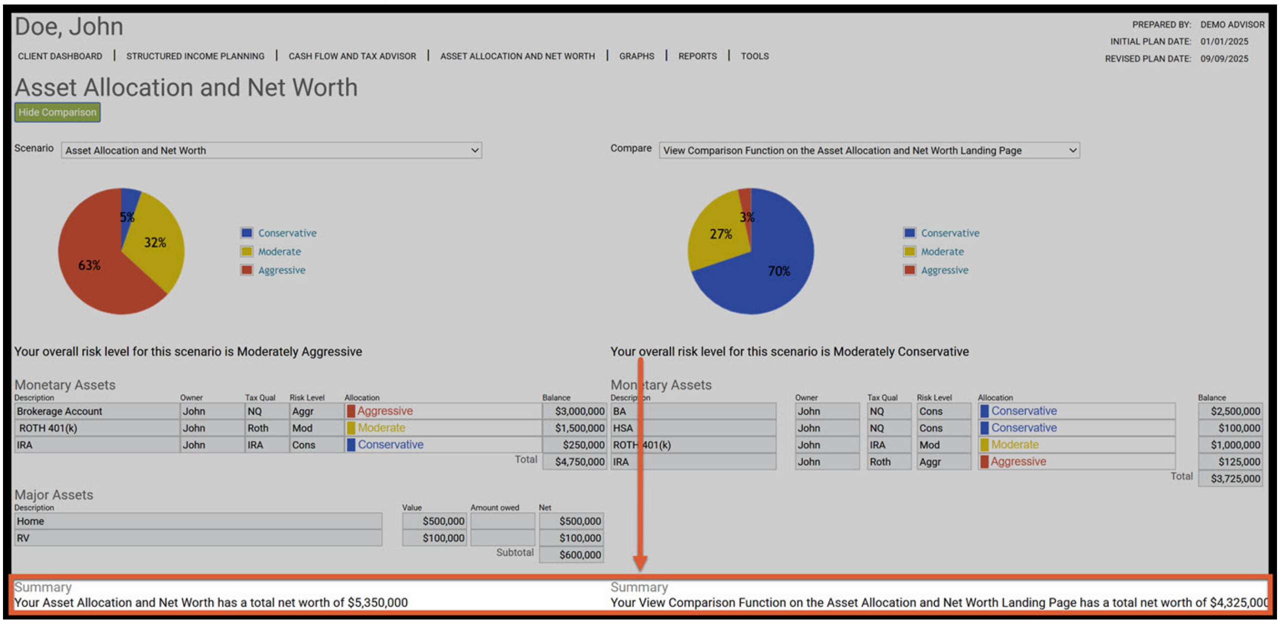
Step 7: Monetary Assets: SIPS should automatically display the monetary assets.



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.