

Generate Report Function

01/12/2026 11:33 am EST

The Reports Landing Page allows you to instantly capture and share a customizable snapshot of your client's financial data. The report is created as a pdf document so it is easy to give digitally or in a paper format. You can use the simple checkbox format to select the pages you need, and the generated PDF will automatically reflect the scenario currently displayed on the Structured Income Planning page. All pages are optional. The report will reflect whichever scenario is currently displayed on the Structured Income Planning Page. Below is a hypothetical example of generating a report.

To learn more about reports see articles:

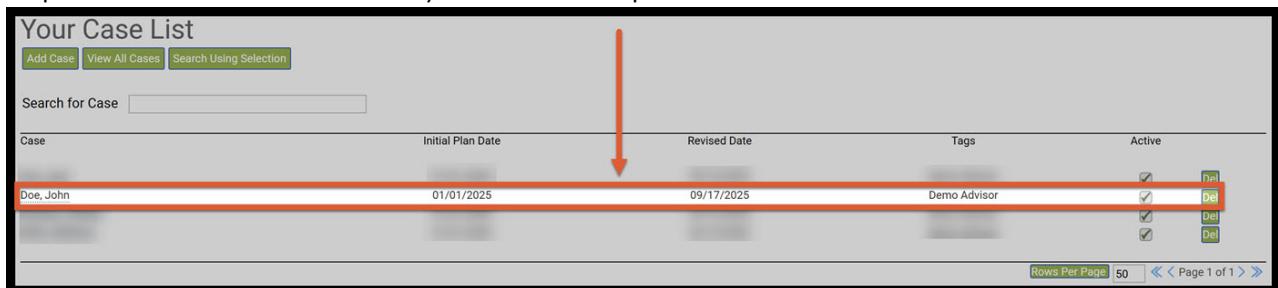
- [Generate Report Function](#)
- [Understanding the Data from the Select Pages in Reports](#)

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



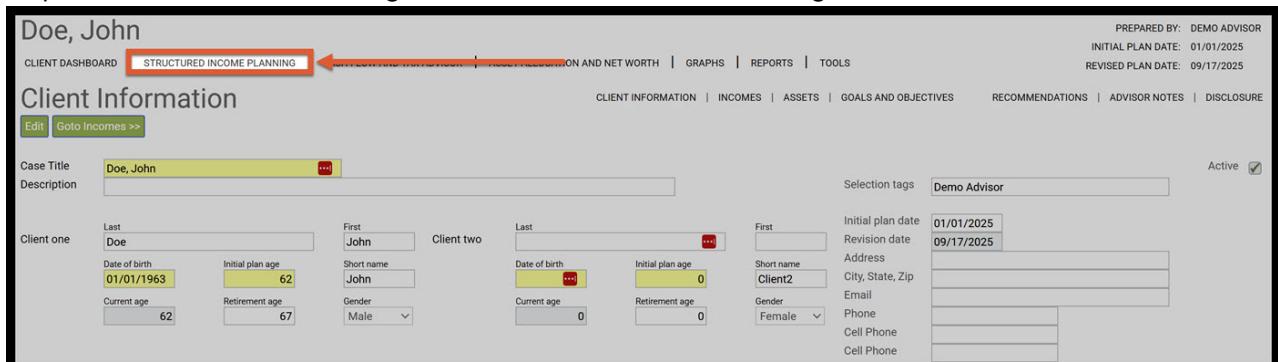
The screenshot shows a table with columns: Case, Initial Plan Date, Revised Date, Tags, and Active. There is one row visible with the data: Doe, John, 01/01/2025, 09/17/2025, Demo Advisor, and Active. At the bottom right of the table, there is a 'Rows Per Page' dropdown set to 50, and navigation buttons for 'No records' and 'Page 1 of 1'.

Step 2: Case: Click the Client account you would like to open.



The screenshot shows the same table as the previous step, but the row for 'Doe, John' is highlighted with a red arrow pointing to it. The data in the row is: Doe, John, 01/01/2025, 09/17/2025, Demo Advisor, and Active. The 'Tags' column shows checkboxes for 'Demo Advisor' and 'Del', which are checked.

Step 3: Structured Income Planning: Click the Structured Income Planning link under the Client's name.



The screenshot shows the 'Client Information' page for 'Doe, John'. The 'STRUCTURED INCOME PLANNING' link is highlighted with a red arrow. The page includes sections for 'Client Information', 'Incomes', 'Assets', 'Goals and Objectives', 'Recommendations', 'Advisor Notes', and 'Disclosure'. There are fields for 'Case Title' (Doe, John), 'Last' (Doe), 'First' (John), 'Client two' (Client two), 'Initial plan date' (01/01/2025), 'Revision date' (09/17/2025), and 'Tags' (Demo Advisor). There are also sections for 'Client one' (Last: Doe, Date of birth: 01/01/1963, Current age: 62, Initial plan age: 62, Retirement age: 67, Gender: Male) and 'Client two' (Last: Client two, Date of birth: 01/01/1963, Current age: 0, Initial plan age: 0, Retirement age: 0, Gender: Female).

Step 4: Structured Income Planning Page: Take note of the scenario that is being displayed on the Structured Income Planning Page.

Doe, John

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 09/17/2025

Structured Income Planning

Edit Dynamic Mode

Scenario Generate Report Function

Accounts										Incomes						Expenses				Approximate Income Tax				After Tax Income		After Tax Target		Income Gap		Year	
Planning: 20 years		Horizon		BA		ROTH 401(k)		IRA		Accounts Total		Planned Distribution		Percent Distribution		Wages		SS		Employer Match		Gift to GKS		Travel		Income Tax		Income			Gap
Year	John	Account	Income	Account	Income	Account	Income	Account	Income	Subtotal of account incomes					Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate	Infl Factor	Infl Factor	from total income to target										
net return	62	2.00 %		3.00 %		5.00 %				3,625,000	0				-0.70 %	175,000	0	5,250	(24,000)	(10,000)	(31,247)-18%	89,753	0	89,753							
initial amount	63	2,500,000	0.00 %	1,000,000	0.00 %	125,000	0.00 %	John IRA	125,000	3,625,000	0	3,851,168	(25,408)	-0.68 %	179,550	0	5,408	(24,000)	(10,000)	(32,131)-18%	93,418	0	93,418	end of 1							
bonus % w/bonus	64	2,500,000	0.00 %	1,000,000	0.00 %	125,000	0.00 %	John Inc	125,000	3,625,000	0	3,969,104	(25,570)	-0.66 %	184,218	0	5,570	(24,000)	(10,000)	(33,040)-18%	97,178	0	97,178	end of 2							
end of 1	62	2,562,000	(12,000)	1,035,250	(5,250)	139,250	(8,000)			3,625,000	0					189,008	0	5,737	(24,000)	(10,000)	(33,471)-18%	101,537	0	101,537	end of 3						
end of 2	63	2,625,240	(12,000)	1,071,716	(5,408)	154,212	(8,000)			3,625,000	0					195,740	0	0	(24,000)	(10,000)	(31,692)-14%	72,000	0	72,000	end of 4						
end of 3	64	2,689,745	(12,000)	1,109,437	(5,570)	169,923	(8,000)			3,625,000	0					0	0	0	(24,000)	(10,000)	(32,040)-18%	101,537	0	101,537	end of 5						
end of 4	65	2,755,540	(12,000)	1,148,457	(5,737)	186,419	(8,000)			3,625,000	0					0	0	0	(24,000)	(10,000)	(32,471)-18%	101,537	0	101,537	end of 6						
end of 5	66	2,686,958	123,692	1,182,911	0	195,740	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,692)-14%	72,000	0	72,000	end of 7						
end of 6	67	2,617,238	123,459	1,128,398	0	205,527	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,459)-14%	72,000	0	72,000	end of 8						
end of 7	68	2,546,362	123,221	1,254,950	0	215,804	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,221)-14%	72,000	0	72,000	end of 9						
end of 8	69	2,474,310	122,979	1,292,598	0	226,594	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,979)-14%	72,000	0	72,000	end of 10						
end of 9	70	2,439,154	84,642	1,331,376	0	237,923	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,186)-13%	72,000	0	72,000	end of 11						
end of 10	71	2,404,538	83,400	1,371,317	0	249,820	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,489)-12%	72,000	0	72,000	end of 12						
end of 11	72	2,370,502	82,127	1,412,457	0	262,311	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,596)-12%	72,000	0	72,000	end of 13						
end of 12	73	2,337,078	80,823	1,454,720	0	275,426	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,429)-12%	72,000	0	72,000	end of 14						
end of 13	74	2,304,343	79,488	1,498,475	0	289,197	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,988)-12%	72,000	0	72,000	end of 15						
end of 14	75	2,333,225	17,204	1,485,516	60,914	303,657	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,663)-11%	72,000	0	72,000	end of 16						
end of 15	76	2,365,728	14,162	1,464,438	62,553	318,840	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,444)-11%	72,000	0	72,000	end of 17						
end of 16	77	2,401,712	11,330	1,444,422	63,949	334,782	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,016)-11%	72,000	0	72,000	end of 18						
end of 17	78	2,441,596	8,150	1,422,099	65,656	351,521	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,680)-11%	72,000	0	72,000	end of 19						
end of 18	79	2,485,528	4,899	1,397,364	67,398	369,097	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(32,338)-10%	72,000	0	72,000	end of 20						
end of 19	80	2,533,664	1,575	1,370,108	69,176	387,552	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,989)-10%	72,000	0	72,000	end of 1						
end of 20	81	2,619,474	(35,136)	1,340,588	70,624	406,930	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,954)-10%	72,000	0	72,000	end of 2						

Step 5: Reports: Click the Reports link under the Client's name.

Doe, John

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 09/17/2025

Structured Income Planning

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Planning: 20 years		Horizon		BA		ROTH 401(k)		IRA		Accounts Total		Planned Distribution		Percent Distribution		Wages		SS		Employer Match		Gift to GKS		Travel		Income Tax		Income			Gap
Year	John	Account	Income	Account	Income	Account	Income	Account	Income	Subtotal of account incomes					Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate	Infl Factor	Infl Factor	from total income to target										
net return	62	2.00 %		3.00 %		5.00 %				3,625,000	0				-0.70 %	175,000	0	5,250	(24,000)	(10,000)	(31,247)-18%	89,753	0	89,753							
initial amount	63	2,500,000	0.00 %	1,000,000	0.00 %	125,000	0.00 %	John IRA	125,000	3,625,000	0	3,851,168	(25,408)	-0.68 %	179,550	0	5,408	(24,000)	(10,000)	(32,131)-18%	93,418	0	93,418	end of 1							
bonus % w/bonus	64	2,500,000	0.00 %	1,000,000	0.00 %	125,000	0.00 %	John Inc	125,000	3,625,000	0	3,969,104	(25,570)	-0.66 %	184,218	0	5,570	(24,000)	(10,000)	(33,040)-18%	97,178	0	97,178	end of 2							
end of 1	62	2,562,000	(12,000)	1,035,250	(5,250)	139,250	(8,000)			3,625,000	0					189,008	0	5,737	(24,000)	(10,000)	(33,471)-18%	101,537	0	101,537	end of 3						
end of 2	63	2,625,240	(12,000)	1,071,716	(5,408)	154,212	(8,000)			3,625,000	0					195,740	0	0	(24,000)	(10,000)	(31,692)-14%	72,000	0	72,000	end of 4						
end of 3	64	2,689,745	(12,000)	1,109,437	(5,570)	169,923	(8,000)			3,625,000	0					0	0	0	(24,000)	(10,000)	(32,040)-18%	101,537	0	101,537	end of 5						
end of 4	65	2,755,540	(12,000)	1,148,457	(5,737)	186,419	(8,000)			3,625,000	0					0	0	0	(24,000)	(10,000)	(32,471)-18%	101,537	0	101,537	end of 6						
end of 5	66	2,686,958	123,692	1,182,911	0	195,740	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,692)-14%	72,000	0	72,000	end of 7						
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end of 13	74	2,304,343	79,488	1,498,475	0	289,197	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,988)-12%	72,000	0	72,000	end of 15						
end of 14	75	2,333,225	17,204	1,482,516	60,914	303,657	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,666)-11%	72,000	0	72,000	end of 16						
end of 15	76	2,365,728	14,162	1,464,438	62,553	318,840	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,444)-11%	72,000	0	72,000	end of 17						
end of 16	77	2,401,712	11,330	1,444,422	63,949	334,782	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,016)-11%	72,000	0	72,000	end of 18						
end of 17	78	2,441,596	8,150	1,422,099	65,656	351,521	0			3,625,000	0					0	0	0	(24,000)	(10,000)	(31,680)-11%	72,000	0								

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: 09/17/2025

Reports

[Generate Report](#)

Select Pages To Include

- Cover Page
- Client Details
- Cash Flow and Income Taxes
- Asset Allocation and Net Worth
- Structured Income Plan
- Structured Income Plan Graph
- Summary of Recommendations
- Goals
- Notes

Use 2 page income plan
 Use Legal Size Paper

Name

Step 7: Generate Report: Click the green Generate Report button under the Reports heading.

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
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Reports

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Name

Step 8: Download: Locate and open the PDF that was created. (or: Double-click the created PDF.)



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.