

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.

Your Case List

Add Case **View All Cases** Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
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Rows Per Page: 50 << No records >>

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

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	09/17/2025	Demo Advisor	<input checked="" type="checkbox"/>

Rows Per Page: 50 << Page 1 of 1 >>

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

Doe, John

CLIENT DASHBOARD **STRUCTURED INCOME PLANNING** ON AND NET WORTH | GRAPHS | REPORTS | TOOLS

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

Client Information

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Goto Incomes >>

Case Title: Doe, John
Description:

Selection tags: Demo Advisor Active ☒

Client one: Last: Doe, First: John, Date of birth: 01/01/1963, Initial plan age: 62, Current age: 62, Retirement age: 67, Gender: Male

Client two: Last: , First: , Date of birth: , Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Female

Initial plan date: 01/01/2025
Revision date: 09/17/2025
Address:
City, State, Zip:
Email:
Phone:
Cell Phone:

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

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

Structured Income Planning

Edit

Dynamic Mode

Scenario

Generate Report Function

Planning 20 years

Horizon

Accounts

BA

ROTH 401(k)

IRA

Incomes

Expenses

Year	John	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gift to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	62	2,500,000	2.00 %	1,000,000	3.00 %	John IRA	125,000	3,625,000												
initial amount	63	2,500,000	0.00 %	1,000,000	0.00 %	John inc	0.00 %	3,625,000	Subtotal of account incomes		Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	from total income to target	
w/bonus	64	2,500,000	0.00 %	1,000,000	0.00 %		125,000	3,625,000			2.60 %	2.60 %	3.00 %	0.00 %	0.00 %			0.00 %		
end of 1	62	2,562,000	(12,000)	1,035,250	(5,250)	139,250	(8,000)	3,736,500	(25,250)	-0.70 %	175,000	0	5,250	(24,000)	(10,000)	(31,247)-18%	89,753	0	89,753	end of 1
end of 2	63	2,625,240	(12,000)	1,071,716	(5,408)	154,212	(8,000)	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 2
end of 3	64	2,689,745	(12,000)	1,109,437	(5,570)	169,923	(8,000)	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 3
end of 4	65	2,755,540	(12,000)	1,148,457	(5,737)	186,419	(8,000)	4,090,416	(25,737)	-0.65 %	189,008	0	5,737	(24,000)	(10,000)	(33,471)-18%	101,537	0	101,537	end of 4
end of 5	66	2,886,958	123,692	1,182,911	0	195,740	0	4,065,609	123,692	3.02 %	0	0	0	(24,000)	(10,000)	(17,692)-14%	72,000	72,000	0	end of 5
end of 6	67	2,617,238	123,459	1,218,398	0	205,527	0	4,041,163	123,459	3.04 %	0	0	0	(24,000)	(10,000)	(17,459)-14%	72,000	72,000	0	end of 6
end of 7	68	2,546,362	123,221	1,254,950	0	215,804	0	4,017,115	123,221	3.05 %	0	0	0	(24,000)	(10,000)	(17,221)-14%	72,000	72,000	0	end of 7
end of 8	69	2,474,310	122,979	1,292,598	0	226,594	0	3,993,502	122,979	3.06 %	0	0	0	(24,000)	(10,000)	(16,979)-14%	72,000	72,000	0	end of 8
end of 9	70	2,439,154	84,642	1,331,376	0	237,923	0	4,008,454	84,642	2.12 %	0	36,544	0	(24,000)	(10,000)	(15,186)-13%	72,000	72,000	0	end of 9
end of 10	71	2,404,538	83,400	1,371,317	0	249,820	0	4,025,674	83,400	2.08 %	0	37,494	0	(24,000)	(10,000)	(14,894)-12%	72,000	72,000	0	end of 10
end of 11	72	2,370,502	82,127	1,412,457	0	262,311	0	4,045,269	82,127	2.04 %	0	38,469	0	(24,000)	(10,000)	(14,596)-12%	72,000	72,000	0	end of 11
end of 12	73	2,337,089	80,823	1,454,830	0	275,426	0	4,067,345	80,823	2.00 %	0	39,469	0	(24,000)	(10,000)	(14,292)-12%	72,000	72,000	0	end of 12
end of 13	74	2,304,343	79,488	1,498,475	0	289,197	0	4,092,015	79,488	1.96 %	0	40,495	0	(24,000)	(10,000)	(13,983)-12%	72,000	72,000	0	end of 13
end of 14	75	2,333,225	17,204	1,482,516	60,914	303,657	0	4,119,398	78,118	1.91 %	0	41,548	0	(24,000)	(10,000)	(13,666)-11%	72,000	72,000	0	end of 14
end of 15	76	2,365,728	14,162	1,464,438	62,553	318,840	0	4,149,006	76,715	1.86 %	0	42,629	0	(24,000)	(10,000)	(13,344)-11%	72,000	72,000	0	end of 15
end of 16	77	2,401,712	11,330	1,444,422	63,949	334,782	0	4,180,916	75,279	1.82 %	0	43,737	0	(24,000)	(10,000)	(13,016)-11%	72,000	72,000	0	end of 16
end of 17	78	2,441,596	8,150	1,422,099	65,656	351,521	0	4,215,216	73,806	1.77 %	0	44,874	0	(24,000)	(10,000)	(12,680)-11%	72,000	72,000	0	end of 17
end of 18	79	2,485,528	4,899	1,397,364	67,398	369,097	0	4,251,990	72,297	1.72 %	0	46,041	0	(24,000)	(10,000)	(12,338)-10%	72,000	72,000	0	end of 18
end of 19	80	2,533,664	1,575	1,370,108	69,176	387,552	0	4,291,324	70,751	1.66 %	0	47,238	0	(24,000)	(10,000)	(11,989)-10%	72,000	72,000	0	end of 19
end of 20	81	2,619,474	(35,136)	1,340,588	70,624	406,930	0	4,366,990	35,488	0.83 %	0	48,466	0	0	0	(11,954)-10%	72,000	72,000	0	end of 20
		878,015		438,306		(32,000)		1,284,320			727,776	507,004	21,964	(456,000)	(190,000)	(361,178)	1,533,886	1,152,000	381,886	

Step 5: Reports: Click the Reports link under the Client's 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: 09/17/2025

Structured Income Planning

Edit

Dynamic Mode

Scenario

Generate Report Function

Planning Horizon

20 years

Accounts

BA

ROTH 401(K)

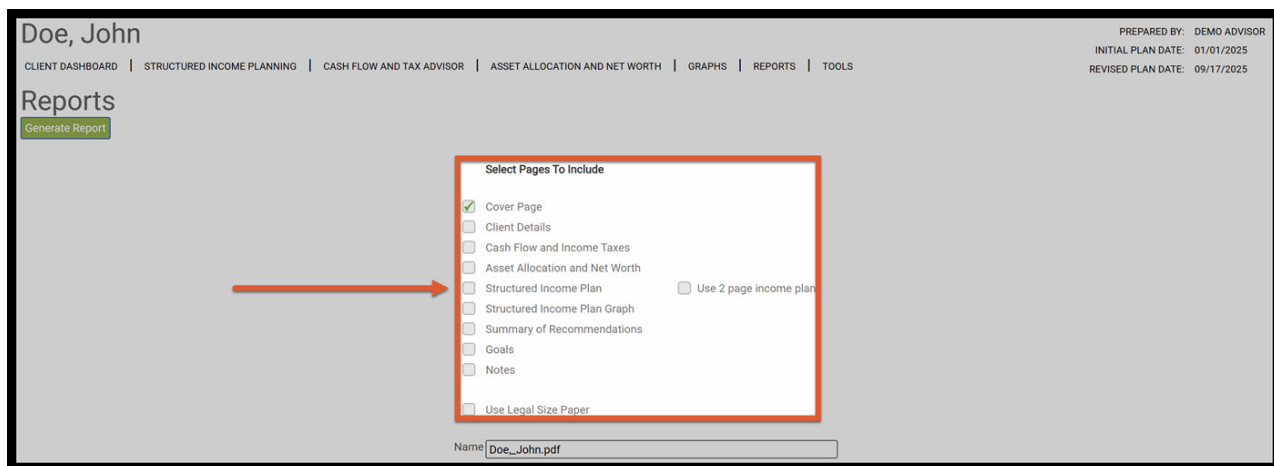
IRA

Incomes

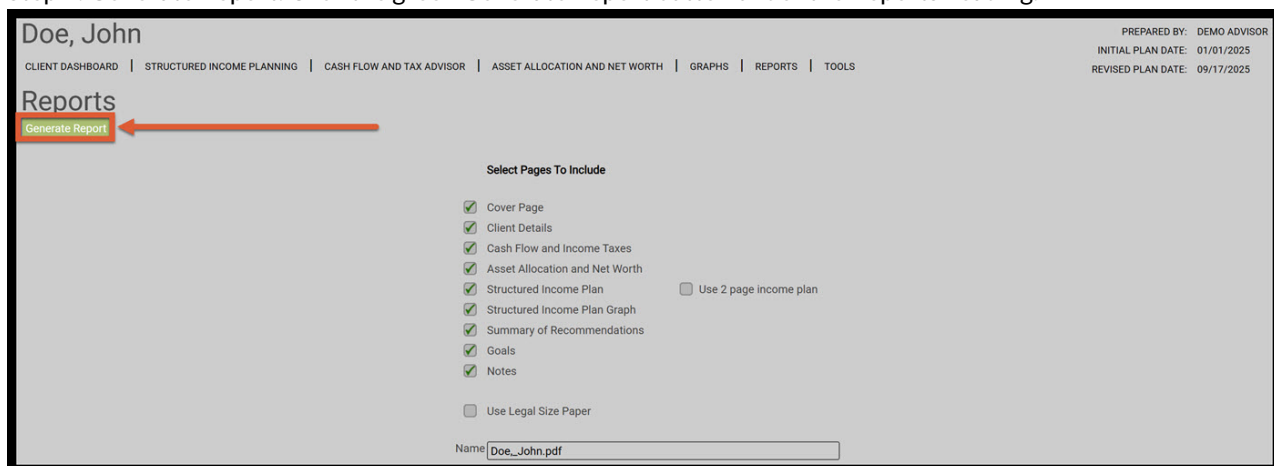
Expenses

Year	John	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gift to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	62	2,500,000	2.00 %	1,000,000	3.00 %	John IRA	125,000	3,625,000												
initial amount		2,500,000	0.00 %	1,000,000	0.00 %	John inc	0.00 %	3,625,000												
w/bonus		2,500,000	0.00 %	1,000,000	0.00 %		125,000	3,625,000												
end of 1	62	2,562,000	(12,000)	1,035,250	(5,250)	139,250	(8,000)	3,736,500	(25,250)	-0.70 %	175,000	0	5,250	(24,000)	(10,000)	(31,247)-18%	89,753	0	89,753	end of 1
end of 2	63	2,625,240	(12,000)	1,071,716	(5,408)	154,212	(8,000)	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 2
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end of 5	66	2,886,958	123,692	1,182,911	0	195,740	0	4,065,609	123,692	3.02 %	0	0	0	(24,000)	(10,000)	(17,692)-14%	72,000	72,000	0	end of 5
end of 6	67	2,617,238	123,459	1,218,398	0	205,527	0	4,041,163	123,459	3.04 %	0	0	0	(24,000)	(10,000)	(17,459)-14%	72,000	72,000	0	end of 6
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end of 17	78	2,441,596	8,150	1,422,099	65,656	351,521	0	4,215,216	73,806	1.77 %	0	44,874	0	(24,000)	(10,000)	(12,680)-11%	72,000	72,000	0	end of 17
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end of 20	81	2,619,474	(35,136)	1,340,588	70,624	406,930	0	4,366,990	35,488	0.83 %	0	48,466	0	0	0	(11,954)-10%	72,000	72,000	0	end of 20
		878,015		438,306		(32,000)		1,284,320			727,776	507,004	21,964	(456,000)	(190,000)	(361,178)	1,533,886	1,152,000	381,886	

Step 6: Select Pages to Include: Click the checkboxes for the pages you would like to include in the report.



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



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.