

# Planned Yearly Income Graph

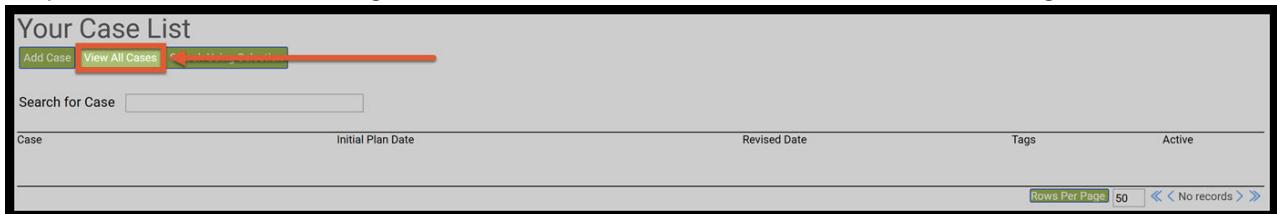
01/12/2026 11:32 am EST

The Graph Landing Page gives your clients an immediate, visual understanding of their structured income plan. The planned yearly income allows your clients to quickly understand their structured income plan. Below is a hypothetical example of a complex structured income plan to demonstrate how the yearly income is calculated and presented.

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

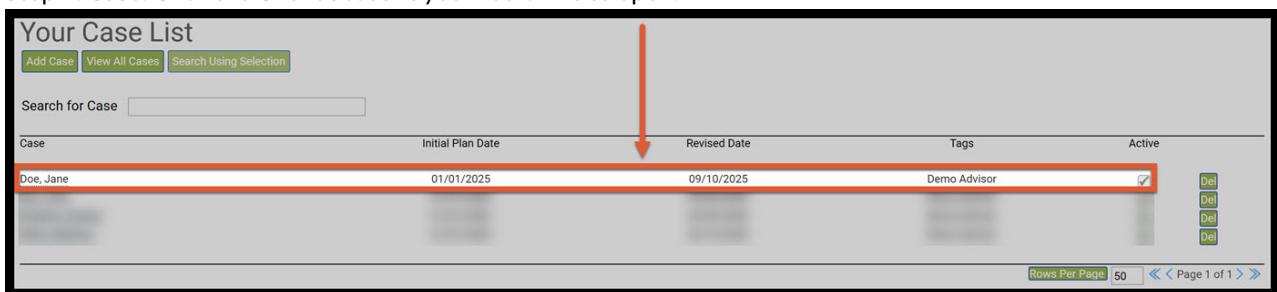
- [Asset Allocation and Net Worth](#)
- [View Comparison Function on the Asset Allocation and Net Worth Landing Page](#)
- [Projected Account Value Graph](#)
- [Planned Yearly Income Graph](#)

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



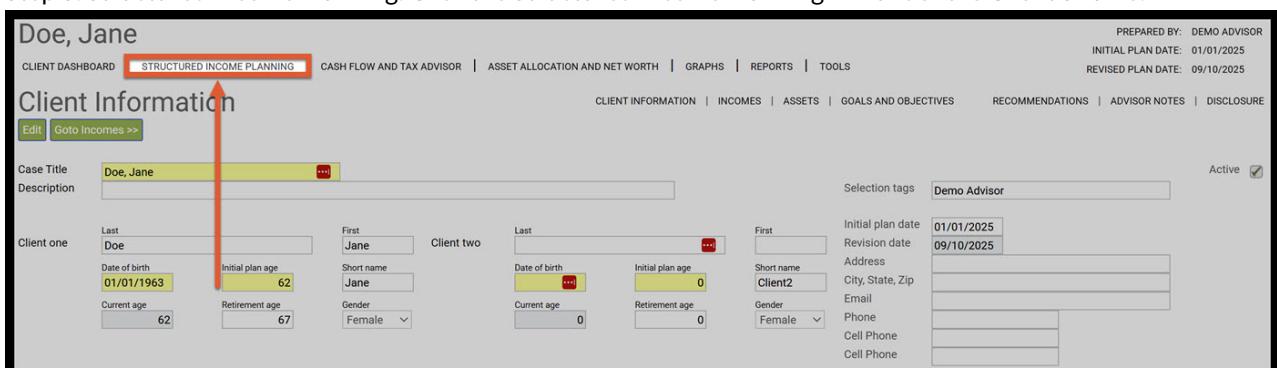
The screenshot shows a table with columns: Case, Initial Plan Date, Revised Date, Tags, and Active. One row is highlighted with a red box, and the 'Doe, Jane' row is also highlighted with a red box. The 'View All Cases' button is located at the top left of the table area, with a red arrow pointing to it.

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



The screenshot shows a table with columns: Case, Initial Plan Date, Revised Date, Tags, and Active. The 'Doe, Jane' row is highlighted with a red box. A red arrow points to this row. The 'View All Cases' button is located at the top left of the table area.

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, Jane'. 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. It also shows details for 'Client one' and 'Client two'.

## Step 4: Structured Income Planning Page: Take note of the structured income plan.

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE: 01/01/2025  
REVISED PLAN DATE: 09/10/2025

Doe, Jane

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

Structured Income Planning

Edit | Dynamic Mode

Scenario | Graphs

Planning: 24 years | Accounts | Incomes | Expenses

BA | IRA | ROTH 401(k)

Wages | SS | Employer Match | Gifting to GKS | Travel

Approx Income Tax | After Tax Income | After Tax Target | Income Gap | Year

Year | Jane | Account | Income | Account | Income | Account | Income | Accounts Total | Planned Distribution | Percent Distribution | Wages | SS | Employer Match | Gifting to GKS | Travel | Approx Income Tax | After Tax Income | After Tax Target | Income Gap | Year

net return | 62 | 2.00 % | 3.00 % | 5.00 % | 6.00 % | 7.00 % | 8.00 % | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,250 | (48,000) | (7,500) | (44,452) | 60,000 | 60,000 | 0 | end of 1

initial amount | 3,000,000 | 125,000 | 2,000,000 | 0 | 0 | 0 | 0 | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,381 | (48,000) | (7,500) | (45,122) | 61,200 | 61,200 | 0 | end of 2

bonus % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,516 | (48,000) | (7,500) | (45,950) | 62,424 | 62,424 | 0 | end of 3

w/bonus | 3,000,000 | 125,000 | 2,000,000 | 0 | 0 | 0 | 0 | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,654 | (48,000) | (7,500) | (46,395) | 63,672 | 63,672 | 0 | end of 4

end of 1 | 62 | 3,061,798 | (1,798) | 136,750 | (8,000) | 2,110,500 | (10,500) | 5,309,948 | (20,298) | -0.40 % | 175,000 | 0 | 5,250 | (48,000) | (7,500) | (44,452) | 60,000 | 60,000 | 0 | end of 1

end of 2 | 63 | 3,127,381 | (4,347) | 148,852 | (8,000) | 2,226,787 | (10,762) | 5,503,021 | (23,109) | -0.43 % | 179,550 | 0 | 5,381 | (48,000) | (7,500) | (45,122) | 61,200 | 61,200 | 0 | end of 2

end of 3 | 64 | 3,196,575 | (6,828) | 161,318 | (8,000) | 2,349,158 | (11,032) | 5,707,233 | (25,860) | -0.47 % | 184,218 | 0 | 5,516 | (48,000) | (7,500) | (45,950) | 62,424 | 62,424 | 0 | end of 3

end of 4 | 65 | 3,270,478 | (9,786) | 174,158 | (8,000) | 2,477,924 | (11,308) | 5,922,560 | (29,994) | -0.51 % | 189,008 | 0 | 5,654 | (48,000) | (7,500) | (46,395) | 63,672 | 63,672 | 0 | end of 4

end of 5 | 66 | 3,348,136 | (12,248) | 187,382 | (8,000) | 2,613,410 | (11,590) | 6,148,928 | (31,838) | -0.54 % | 193,922 | 0 | 5,795 | (48,000) | (7,500) | (47,433) | 64,946 | 64,946 | 0 | end of 5

end of 6 | 67 | 3,372,154 | 42,945 | 201,004 | (8,000) | 2,749,330 | (5,250) | 6,324,288 | 29,695 | 0.48 % | 87,500 | 27,287 | 2,625 | (48,000) | (7,500) | (25,362) | 66,245 | 66,245 | 0 | end of 6

end of 7 | 68 | 3,355,964 | 83,632 | 211,034 | (4,000) | 2,886,797 | (6,559) | 6,453,795 | 79,632 | 1.26 % | 24,000 | 27,996 | 0 | (48,000) | (7,500) | (8,559) | 67,570 | 67,570 | 0 | end of 7

end of 8 | 69 | 3,399,481 | 83,603 | 221,365 | (4,000) | 3,031,137 | (6,559) | 6,591,982 | 79,603 | 1.23 % | 24,624 | 28,724 | 0 | (48,000) | (7,500) | (8,530) | 68,921 | 68,921 | 0 | end of 8

end of 9 | 70 | 3,347,906 | 58,365 | 228,006 | 0 | 3,182,694 | (6,559) | 6,758,605 | 58,365 | 0.89 % | 25,264 | 29,471 | 0 | (48,000) | (7,500) | (9,600) | 48,000 | 48,000 | 0 | end of 9

end of 10 | 71 | 3,336,244 | 78,620 | 234,846 | 0 | 3,341,828 | (6,559) | 6,912,918 | 78,620 | 1.16 % | 30,237 | 0 | (48,000) | (10,000) | (2,857) | 48,000 | 48,000 | 0 | end of 10

end of 11 | 72 | 3,325,282 | 77,686 | 241,891 | 0 | 3,508,919 | (6,559) | 7,076,993 | 77,686 | 1.12 % | 31,024 | 0 | (48,000) | (10,000) | (2,710) | 48,000 | 48,000 | 0 | end of 11

end of 12 | 73 | 3,315,048 | 76,740 | 249,148 | 0 | 3,684,365 | (6,559) | 7,248,562 | 76,740 | 1.09 % | 31,830 | 0 | (48,000) | (10,000) | (2,570) | 48,000 | 48,000 | 0 | end of 12

end of 13 | 74 | 3,305,571 | 75,778 | 256,623 | 0 | 3,868,583 | (6,559) | 7,430,776 | 75,778 | 1.05 % | 32,658 | 0 | (48,000) | (10,000) | (2,436) | 48,000 | 48,000 | 0 | end of 13

end of 14 | 75 | 3,316,668 | 55,014 | 253,889 | 10,432 | 4,062,012 | (6,559) | 7,632,570 | 65,446 | 0.88 % | 33,507 | 0 | (48,000) | (10,000) | (4,953) | 36,000 | 36,000 | 0 | end of 14

end of 15 | 76 | 3,329,130 | 53,871 | 250,793 | 10,713 | 4,265,112 | (6,559) | 7,845,036 | 64,584 | 0.85 % | 34,378 | 0 | (48,000) | (10,000) | (4,962) | 36,000 | 36,000 | 0 | end of 15

end of 16 | 77 | 3,342,971 | 52,741 | 247,366 | 10,952 | 4,478,368 | (6,559) | 8,068,704 | 63,693 | 0.81 % | 35,272 | 0 | (48,000) | (10,000) | (4,965) | 36,000 | 36,000 | 0 | end of 16

end of 17 | 78 | 3,358,276 | 51,554 | 243,543 | 11,244 | 4,702,286 | (6,559) | 8,304,105 | 62,798 | 0.78 % | 36,189 | 0 | (48,000) | (10,000) | (4,987) | 36,000 | 36,000 | 0 | end of 17

end of 18 | 79 | 3,375,100 | 50,342 | 239,307 | 11,542 | 4,937,400 | (6,559) | 8,551,806 | 61,884 | 0.75 % | 37,130 | 0 | (48,000) | (10,000) | (5,014) | 36,000 | 36,000 | 0 | end of 18

end of 19 | 80 | 3,393,496 | 49,106 | 234,639 | 11,847 | 5,184,270 | (6,559) | 8,812,405 | 60,953 | 0.71 % | 38,095 | 0 | (48,000) | (10,000) | (5,048) | 36,000 | 36,000 | 0 | end of 19

end of 20 | 81 | 3,423,475 | 37,890 | 229,583 | 12,095 | 5,443,484 | (6,559) | 9,096,542 | 49,985 | 0.57 % | 39,086 | 0 | (48,000) | (10,000) | (5,071) | 36,000 | 36,000 | 0 | end of 20

end of 21 | 82 | 3,455,309 | 36,636 | 224,061 | 12,410 | 5,715,658 | (6,559) | 9,395,027 | 49,046 | 0.54 % | 40,102 | 0 | (48,000) | (10,000) | (5,148) | 36,000 | 36,000 | 0 | end of 21

end of 22 | 83 | 3,489,007 | 35,407 | 218,124 | 12,659 | 6,001,440 | (6,559) | 9,708,571 | 48,066 | 0.51 % | 41,145 | 0 | (48,000) | (10,000) | (5,211) | 36,000 | 36,000 | 0 | end of 22

end of 23 | 84 | 3,524,684 | 34,103 | 211,684 | 12,984 | 6,301,512 | (6,559) | 10,037,880 | 47,087 | 0.49 % | 42,214 | 0 | (48,000) | (10,000) | (5,301) | 36,000 | 36,000 | 0 | end of 23

end of 24 | 85 | 3,562,345 | 32,833 | 204,804 | 13,230 | 6,616,587 | (6,559) | 10,383,736 | 46,063 | 0.46 % | 43,312 | 0 | (48,000) | (10,000) | (5,375) | 36,000 | 36,000 | 0 | end of 24

## Step 5: Graphs: Click the Graph link under the Client's name.

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE: 01/01/2025  
REVISED PLAN DATE: 09/10/2025

Doe, Jane

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

Structured Income Planning

Edit | Dynamic Mode

Scenario | Graphs

Planning: 24 years | Accounts | Incomes | Expenses

BA | IRA | ROTH 401(k)

Wages | SS | Employer Match | Gifting to GKS | Travel

Approx Income Tax | After Tax Income | After Tax Target | Income Gap | Year

Year | Jane | Account | Income | Account | Income | Account | Income | Accounts Total | Planned Distribution | Percent Distribution | Wages | SS | Employer Match | Gifting to GKS | Travel | Approx Income Tax | After Tax Income | After Tax Target | Income Gap | Year

net return | 62 | 2.00 % | 3.00 % | 5.00 % | 6.00 % | 7.00 % | 8.00 % | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,250 | (48,000) | (7,500) | (44,452) | 60,000 | 60,000 | 0 | end of 1

initial amount | 3,000,000 | 125,000 | 2,000,000 | 0 | 0 | 0 | 0 | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,381 | (48,000) | (7,500) | (45,122) | 61,200 | 61,200 | 0 | end of 2

bonus % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,516 | (48,000) | (7,500) | (45,950) | 62,424 | 62,424 | 0 | end of 3

w/bonus | 3,000,000 | 125,000 | 2,000,000 | 0 | 0 | 0 | 0 | 5,125,000 | 0 | 0 | 175,000 | 0 | 5,654 | (48,000) | (7,500) | (46,395) | 63,672 | 63,672 | 0 | end of 4

end of 1 | 62 | 3,061,798 | (1,798) | 136,750 | (8,000) | 2,110,500 | (10,500) | 5,309,948 | (20,298) | -0.40 % | 175,000 | 0 | 5,250 | (48,000) | (7,500) | (44,452) | 60,000 | 60,000 | 0 | end of 1

end of 2 | 63 | 3,127,381 | (4,347) | 148,852 | (8,000) | 2,226,787 | (10,762) | 5,503,021 | (23,109) | -0.43 % | 179,550 | 0 | 5,381 | (48,000) | (7,500) | (45,122) | 61,200 | 61,200 | 0 | end of 2

end of 3 | 64 | 3,196,575 | (6,828) | 161,318 | (8,000) | 2,349,158 | (11,032) | 5,707,233 | (25,860) | -0.47 % | 184,218 | 0 | 5,516 | (48,000) | (7,500) | (45,950) | 62,424 | 62,424 | 0 | end of 3

end of 4 | 65 | 3,270,478 | (9,786) | 174,158 | (8,000) | 2,477,924 | (11,308) | 5,922,560 | (29,994) | -0.51 % | 189,008 | 0 | 5,654 | (48,000) | (7,500) | (46,395) | 63,672 | 63,672 | 0 | end of 4

end of 5 | 66 | 3,348,136 | (12,248) | 187,382 | (8,000) | 2,613,410 | (11,590) | 6,148,928 | (31,838) | -0.54 % | 193,922 | 0 | 5,795 | (48,000) | (7,500) | (47,433) | 64,946 | 64,946 | 0 | end of 5

end of 6 | 67 | 3,372,154 | 42,945 | 201,004 | (8,000) | 2,749,330 | (5,250) | 6,324,288 | 29,695 | 0.48 % | 87,500 | 27,287 | 2,625 | (48,000) | (7,500) | (25,362) | 66,245 | 66,245 | 0 | end of 6

end of 7 | 68 | 3,355,964 | 83,632 | 211,034 | (4,000) | 2,886,797 | (6,559) | 6,453,795 | 79,632 | 1.26 % | 24,000 | 27,996 | 0 | (48,000) | (7,500) | (8,559) | 67,570 | 67,570 | 0 | end of 7

end of 8 | 69 | 3,399,481 | 83,603 | 221,365 | (4,000) | 3,031,137 | (6,559) | 6,591,982 | 79,603 | 1.23 % | 24,624 | 28,724 | 0 | (48,000) | (7,500) | (8,530) | 68,921 | 68,921 | 0 | end of 8

end of 9 | 70 | 3,347,906 | 58,365 | 228,006 | 0 | 3,182,694 | (6,559) | 6,758,605 | 58,365 | 0.89 % | 25,264 | 29,471 | 0 | (48,000) | (7,500) | (9,600) | 48,000 | 48,000 | 0 | end of 9

end of 10 | 71 | 3,336,244 | 78,620 | 234,846 | 0 | 3,341,828 | (6,559) | 6,912,918 | 78,620 | 1.16 % | 30,237 | 0 | (48,000) | (10,000) | (2,857) | 48,000 | 48,000 | 0 | end of 10

end of 11 | 72 | 3,325,282 | 77,686 | 241,891 | 0 | 3,508,919 | (6,559) | 7,076,993 | 77,686 | 1.12 % | 31,024 | 0 | (48,000) | (10,000) | (2,710) | 48,000 | 48,000 | 0 | end of 11

end of 12 | 73 | 3,315,048 | 76,740 | 249,148 | 0 | 3,684,365 | (6,559) | 7,248,562 | 76,740 | 1.09 % | 31,830 | 0 | (48,000) | (10,000) | (2,570) | 48,000 | 48,000 | 0 | end of 12

end of 13 | 74 | 3,305,571 | 75,778 | 256,623 | 0 | 3,868,583 | (6,559) | 7,430,776 | 75,778 | 1.05 % | 32,658 | 0 | (48,000) | (10,000) | (2,436) | 48,000 | 48,000 | 0 | end of 13

end of 14 | 75 | 3,316,668 | 55,014 | 253,889 | 10,432 | 4,062,012 | (6,559) | 7,632,570 | 65,446 | 0.88 % | 33,507 | 0 | (48,000) | (10,000) | (4,953) | 36,000 | 36,000 | 0 | end of 14

end of 15 | 76 | 3,329,130 | 53,871 | 250,793 | 10,713 | 4,265,112 | (6,559) | 7,845,036 | 64,584 | 0.85 % | 34,378 | 0 | (48,000) | (10,000) | (4,962) | 36,000 | 36,000 | 0 | end of 15

end of 16 | 77 | 3,342,971 | 52,741 | 247,366 | 10,952 | 4,478,368 | (6,559) | 8,068,704 | 63,693 | 0.81 % | 35,272 | 0 | (48,000) | (10,000) | (4,965) | 36,000 | 36,000 | 0 | end of 16

end of 17 | 78 | 3,358,276 | 51,554 | 243,543 | 11,244 | 4,702,286 | (6,559) | 8,304,105 | 62,798 | 0.78 % | 36,189 | 0 | (48,000) | (10,000) | (4,987) | 36,000 | 36,000 | 0 | end of 17

end of 18 | 79 | 3,375,100 | 50,342 | 239,307 | 11,542 | 4,937,400 | (6,559) | 8,551,806 | 61,884 | 0.75 % | 37,130 | 0 | (48,000) | (10,000) | (5,014) | 36,000 | 36,000 | 0 | end of 18

end of 19 | 80 | 3,393,496 | 49,106 | 234,639 | 11,847 | 5,184,270 | (6,559) | 8,812,405 | 60,953 | 0.71 % | 38,095 | 0 | (48,000) | (10,000) | (5,048) | 36,000 | 36,000 | 0 | end of 19

end of 20 | 81 | 3,423,475 | 37,890 | 229,583 | 12,095 | 5,443,484 | (6,559) | 9,096,542 | 49,985 | 0.57 % | 39,086 | 0 | (48,000) | (10,000) | (5,071) | 36,000 | 36,000 | 0 | end of 20

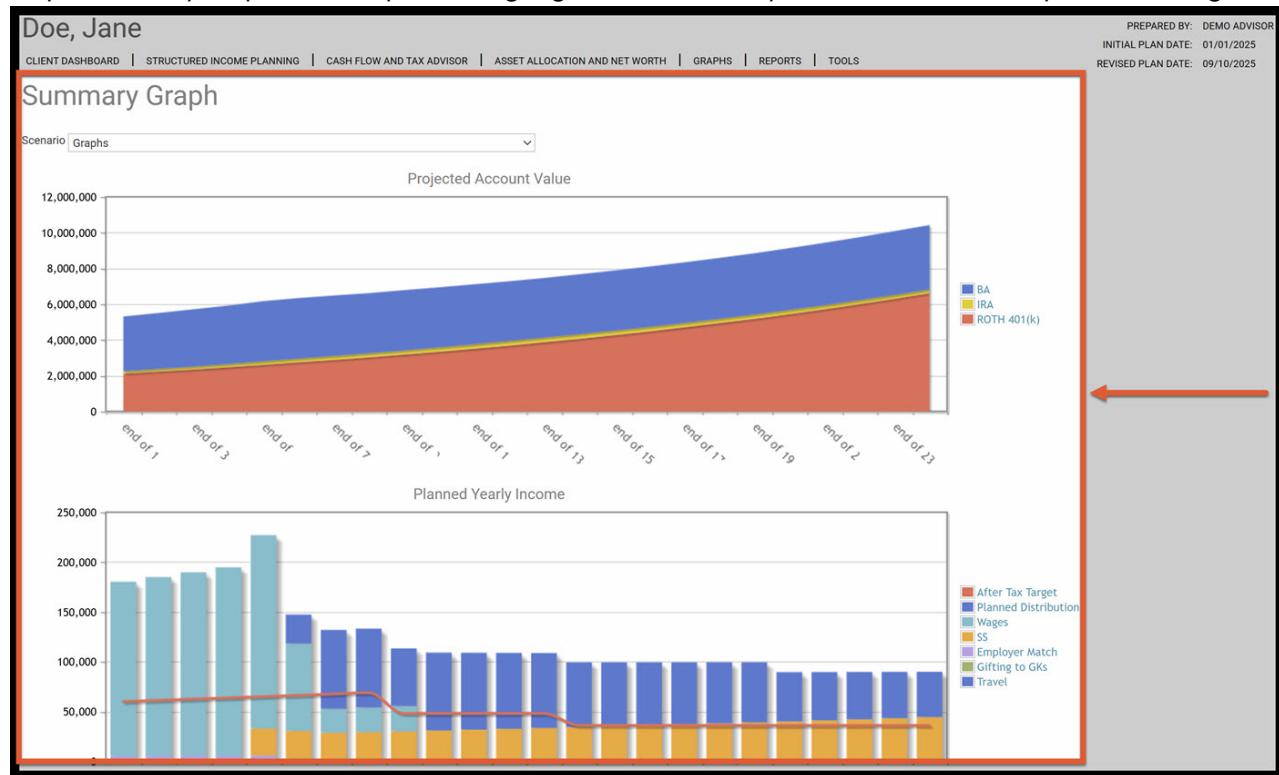
end of 21 | 82 | 3,455,309 | 36,636 | 224,061 | 12,410 | 5,715,658 | (6,559) | 9,395,027 | 49,046 | 0.54 % | 40,102 | 0 | (48,000) | (10,000) | (5,148) | 36,000 | 36,000 | 0 | end of 21

end of 22 | 83 | 3,489,007 | 35,407 | 218,124 | 12,659 | 6,001,440 | (6,559) | 9,708,571 | 48,066 | 0.51 % | 41,145 | 0 | (48,000) | (10,000) | (5,211) | 36,000 | 36,000 | 0 | end of 22

end of 23 | 84 | 3,524,684 | 34,103 | 211,684 | 12,984 | 6,301,512 | (6,559) | 10,037,880 | 47,087 | 0.49 % | 42,214 | 0 | (48,000) | (10,000) | (5,301) | 36,000 | 36,000 | 0 | end of 23

end of 24 | 85 | 3,562,345 | 32,833 | 204,804 | 13,230 | 6,616,587 | (6,559) | 10,383,736 | 46,063 | 0.46 % | 43,312 | 0 | (48,000) | (10,000) | (5,375) | 36,000 | 36,000 | 0 | end of 24

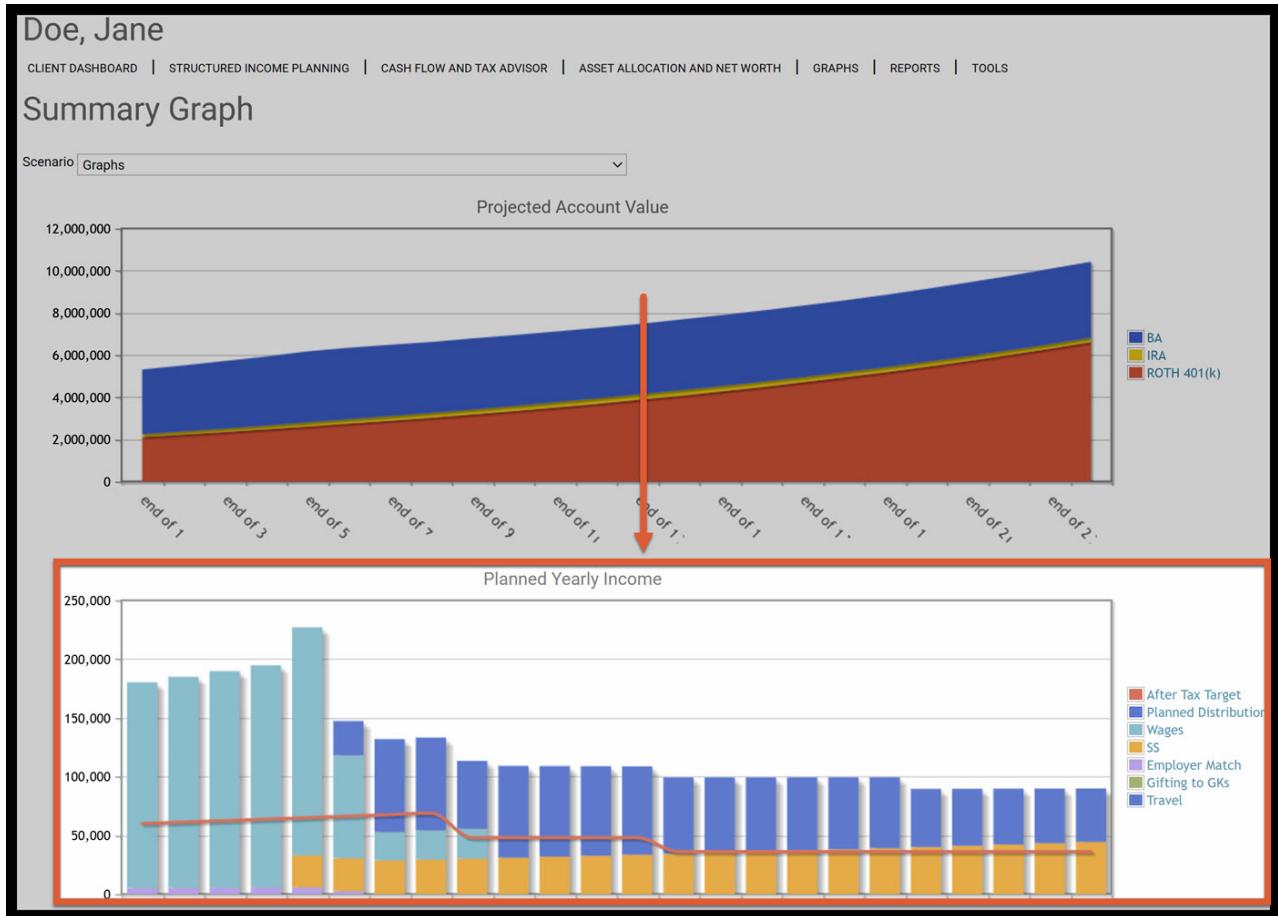
Step 6: Summary Graphs: The Graphs Landing Page will automatically show the scenario that you are working in.



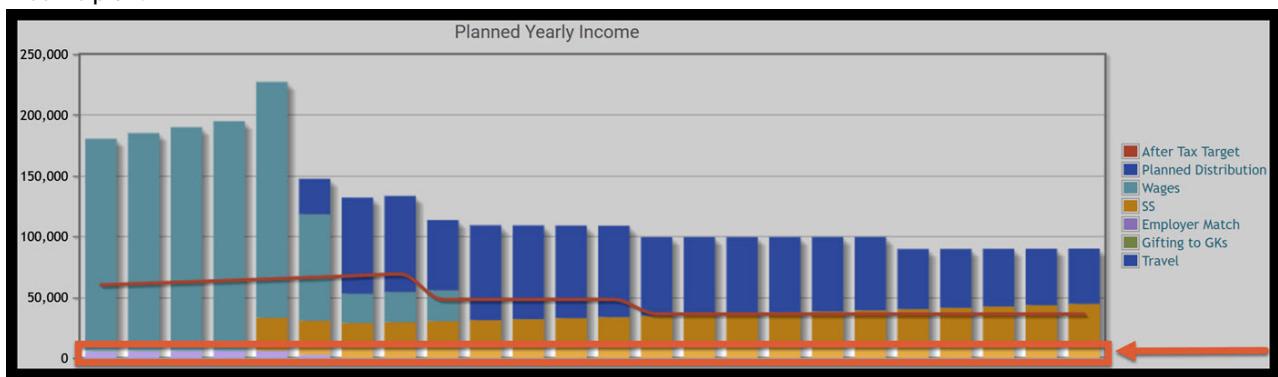
Step 7: Scenario: Use the down caret (v) arrow to select the correct scenario if it is not the correct one by default.



Step 8: Planned Yearly Income: The second graph shown is the Planned Yearly Income graph.



Step 9: Horizontal Axis: The Horizontal Axis represents the planning horizon timeline displayed on the structured income plan.



Step 10: Planning Horizon Timeline in SIPS: Take note of the planning horizon timeline.

## Structured Income Planning

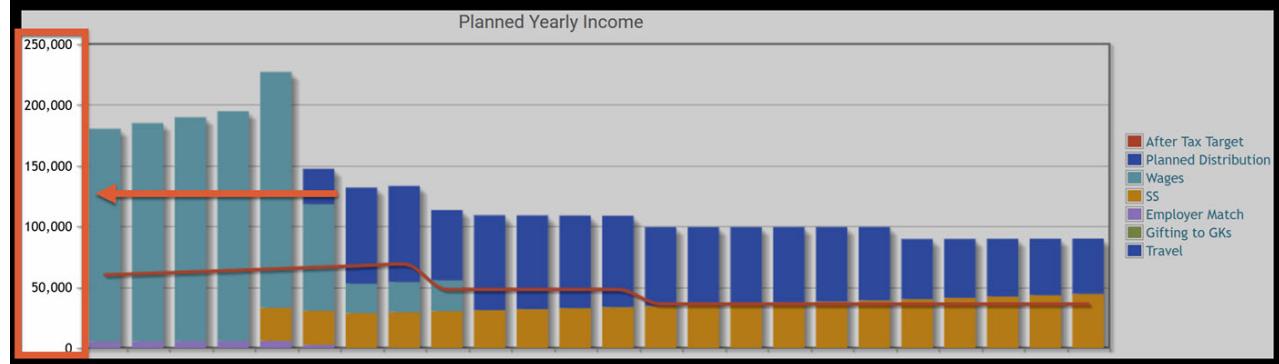
Edit | Dynamic Mode

Scenario | Graphs

Planning 24 years Horizon

Accounts								Incomes					Expenses								
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	62	2.00 %		3.00 %		Jane IRA	5.00 %														
initial amount		3,000,000		0.00 %		Jane Inc	2,000,000														
begin w/bonus		3,000,000		0.00 %			2,000,000														
end of 1	62	3,061,198	(1,798)	136,750	(8,000)	2,110,500	(10,500)	5,125,000	Subtotal incomes		175,000	0	5,250	(48,000)	(44,452)	60,000	60,000	61,200	0	end of 1	
end of 2	63	3,127,381	(4,347)	148,852	(8,000)	2,226,787	(10,762)	5,503,021	(23,109)	0.43 %	179,550	0	5,381	(48,000)	(45,122)	61,200	61,200	62,424	0	end of 2	
end of 3	64	3,196,757	(6,828)	161,318	(8,000)	2,349,158	(11,032)	5,707,233	(25,860)	0.47 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	63,672	0	end of 3
end of 4	65	3,270,478	(9,786)	174,158	(8,000)	2,477,924	(11,308)	5,925,560	(29,994)	0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	64,946	0	end of 4
end of 5	66	3,348,136	(12,249)	187,382	(8,000)	2,613,410	(11,590)	6,148,928	(31,838)	0.54 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	66,245	0	end of 5
end of 6	67	3,377,154	(42,945)	201,004	(8,000)	2,749,330	(5,250)	6,322,488	(29,695)	0.48 %	87,500	2,625	(48,000)	(7,500)	(25,362)	66,245	66,245	67,570	0	end of 6	
end of 7	68	3,355,964	83,632	211,034	(4,000)	2,886,797	0	6,453,795	79,632	1.26 %	24,000	27,996	0	(48,000)	(7,500)	(8,559)	67,570	67,570	68,921	0	end of 7
end of 8	69	3,339,481	83,603	221,365	(4,000)	3,031,137	0	6,591,982	79,603	1.23 %	24,624	28,724	0	(48,000)	(7,500)	(8,530)	68,921	68,921	69,906	0	end of 8
end of 9	70	3,347,906	58,365	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	25,264	29,471	0	(48,000)	(7,500)	(9,600)	48,000	48,000	48,000	0	end of 9
end of 10	71	3,336,244	78,620	234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	48,000	0	end of 10	
end of 11	72	3,325,282	77,686	241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	48,000	0	end of 11	
end of 12	73	3,315,048	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	48,000	0	end of 12	
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	0	7,430,076	75,778	1.05 %	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	48,000	0	end of 13	
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	33,507	0	(48,000)	(10,000)	(4,953)	36,000	36,000	36,000	0	end of 14	
end of 15	76	3,329,130	53,871	250,793	10,713	4,265,112	0	7,845,036	64,584	0.85 %	34,378	0	(48,000)	(10,000)	(4,962)	36,000	36,000	36,000	0	end of 15	
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	35,272	0	(48,000)	(10,000)	(4,965)	36,000	36,000	36,000	0	end of 16	
end of 17	78	3,358,276	51,554	243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	36,000	0	end of 17	
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	36,000	0	end of 18	
end of 19	80	3,393,496	49,106	234,639	11,847	5,184,270	0	8,812,405	60,953	0.71 %	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	36,000	0	end of 19	
end of 20	81	3,423,475	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	39,086	0	(48,000)	(10,000)	(5,071)	36,000	36,000	36,000	0	end of 20	
end of 21	82	3,455,309	36,636	224,061	12,410	5,715,658	0	9,395,027	49,046	0.54 %	40,102	0	(48,000)	(10,000)	(5,148)	36,000	36,000	36,000	0	end of 21	
end of 22	83	3,489,007	35,407	218,124	12,659	6,001,440	0	9,708,571	48,066	0.51 %	41,145	0	(48,000)	(10,000)	(5,211)	36,000	36,000	36,000	0	end of 22	
end of 23	84	3,524,684	34,103	211,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	42,214	0	(48,000)	(10,000)	(5,301)	36,000	36,000	36,000	0	end of 23	
end of 24	85	3,562,345	32,833	204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	43,312	0	(48,000)	(10,000)	(5,375)	36,000	36,000	36,000	0	end of 24	

Step 11: Vertical Axis: The Vertical Axis shows the monetary amounts accumulated over time.



Step 12: Grouping Arrow on the Structured Income Planning Page: To see the vertical axis amounts, click the double arrow in the upper-left corner of the Incomes Group box.

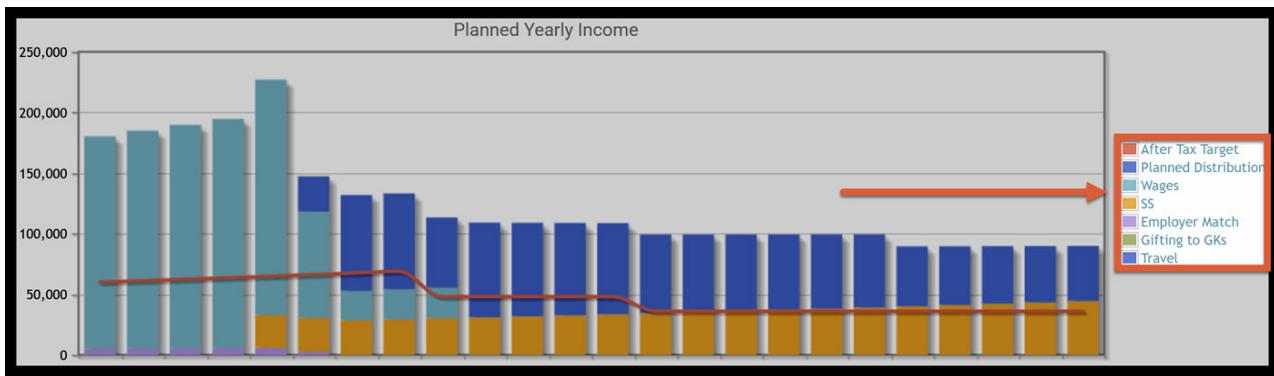
## Structured Income Planning

Edit Dynamic Mode

Scenario		Graphs		Accounts												Incomes					Expenses									
Planning Horizon	24 years			BA			IRA			ROTH 401(k)			Accounts Total	Planned Distribution	Percent Distribution											Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year
		Year	Jane	Account	Income	Account	Income	Account	Income	Wages	SS	Employer Match	Gifting to GKs	Travel	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor						
net return	62	2.00 %			3.00 %			Jane IRA	5.00 %																					
initial amount	63	3,000,000			125,000			Jane inc	2,000,000																					
bonus %	64	0.00 %			0.00 %				0.00 %																					
w/bonus	65	3,000,000			125,000				2,000,000																					
end of 1	62	3,061,798	(1,798)		386,750	(8,000)		2,116,500	(10,500)								5,125,000	Subtotal of account incomes	0	2.60 %	2.60 %	2.50 %	0.00 %	0.00 %						
end of 2	63	3,127,381	(4,347)		148,852	(8,000)		2,226,787	(10,762)								5,125,000	0	-0.40 %	175,000	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1	
end of 3	64	3,196,757	(6,828)		161,318	(8,000)		2,349,158	(11,032)								5,125,000	0	-0.43 %	179,559	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	end of 2	
end of 4	65	3,270,478	(9,786)		174,158	(8,000)		2,477,924	(11,308)								5,125,000	0	-0.47 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	end of 3	
end of 5	66	3,348,136	(12,249)		187,382	(8,000)		2,613,410	(11,590)								5,125,000	0	-0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	0	end of 4	
end of 6	67	3,372,154	(42,945)		201,004	(8,000)		2,749,330	(5,250)								5,125,000	0	-0.54 %	193,923	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	end of 5	
end of 7	68	3,355,664	83,632	211,034	(4,000)	2,886,797	(0)	6,453,795	79,632	1.26 %	24,000	27,996	(0)	(48,000)	(7,500)	0	8,559	0	67,570	0	67,570	0	0	end of 6						
end of 8	69	3,339,481	83,603	221,365	(4,000)	3,031,137	(0)	6,591,982	79,603	1.23 %	24,624	28,724	(0)	(48,000)	(7,500)	0	8,530	0	68,921	0	68,921	0	0	end of 7						
end of 9	70	3,347,906	58,365	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	25,264	29,471	(0)	(48,000)	(7,500)	0	9,600	0	48,000	0	48,000	0	0	end of 8						
end of 10	71	3,336,244	78,620	234,846	0	6,912,918	78,620	1.16 %	0	30,237	(0)	(48,000)	(10,000)	0	0	0	0	0	2,857	0	48,000	0	48,000	0	0	end of 9				
end of 11	72	3,325,282	77,686	241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	31,024	35,272	(0)	(48,000)	(10,000)	0	2,710	0	48,000	0	48,000	0	0	end of 11						
end of 12	73	3,315,048	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	31,830	36,189	(0)	(48,000)	(10,000)	0	2,570	0	48,000	0	48,000	0	0	end of 12						
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	32,658	36,189	(0)	(48,000)	(10,000)	0	2,436	0	48,000	0	48,000	0	0	end of 13						
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	33,507	38,095	(0)	(48,000)	(10,000)	0	5,048	0	36,000	0	36,000	0	0	end of 14						
end of 15	76	3,329,130	53,871	250,793	10,713	4,265,112	0	7,845,036	64,584	0.85 %	34,378	39,086	(0)	(48,000)	(10,000)	0	4,962	0	36,000	0	36,000	0	0	end of 15						
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	35,272	40,102	(0)	(48,000)	(10,000)	0	4,965	0	36,000	0	36,000	0	0	end of 16						
end of 17	78	3,358,276	51,554	243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	36,189	41,496	(0)	(48,000)	(10,000)	0	4,987	0	36,000	0	36,000	0	0	end of 17						
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	37,130	42,214	(0)	(48,000)	(10,000)	0	5,014	0	36,000	0	36,000	0	0	end of 18						
end of 19	80	3,393,496	49,106	234,639	11,847	5,184,270	0	8,812,405	60,953	0.71 %	38,095	43,212	(0)	(48,000)	(10,000)	0	5,048	0	36,000	0	36,000	0	0	end of 19						
end of 20	81	3,423,475	37,890	229,583	12,095	5,443,484	0	9,096,542	64,985	0.57 %	39,086	43,312	(0)	(48,000)	(10,000)	0	5,071	0	36,000	0	36,000	0	0	end of 20						
end of 21	82	3,455,309	36,636	224,061	12,410	5,715,658	0	9,395,027	63,693	0.81 %	40,102	48,000	(0)	(48,000)	(10,000)	0	5,148	0	36,000	0	36,000	0	0	end of 21						
end of 22	83	3,489,007	35,407	218,124	12,659	6,001,440	0	9,708,571	48,066	0.51 %	41,145	48,000	(0)	(5,211)	36,000	0	36,000	0	36,000	0	0	end of 22								
end of 23	84	3,524,684	34,103	211,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	42,214	48,000	(0)	(5,301)	36,000	0	36,000	0	36,000	0	0	end of 23								
end of 24	85	3,562,345	32,833	204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	43,312	48,000	(0)	(5,375)	36,000	0	36,000	0	36,000	0	0	end of 24								

Step 13: Grouped Income Column in SIPS: Take note to the total amounts of Incomes Column.

Scenario		Graphs		Accounts												Incomes					Expenses													
Planning Horizon	24 years			BA			IRA			ROTH 401(k)			Accounts Total	Planned Distribution	Percent Distribution											Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year				
		Year	Jane	Account	Income	Account	Income	Account	Income	Wages	SS	Employer Match	Gifting to GKs	Travel	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor					
net return	62	2.00 %			3.00 %			Jane IRA	5.00 %								5,125,000	Subtotal of account incomes	0	2.60 %	2.60 %	2.50 %	0.00 %	0.00 %										
initial amount	63	3,000,000			125,000			Jane inc	2,000,000								5,125,000	0	-0.40 %	175,000	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1					
bonus %	64	0.00 %			0.00 %				0.00 %								5,125,000	0	-0.43 %	179,559	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	end of 2					
w/bonus	65	3,000,000			125,000				2,000,000								5,125,000	0	-0.47 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	end of 3					
end of 1	62	3,061,798	(1,798)		136,750	(8,000)		2,110,500	(10,500)								5,125,000	0	-0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	0	end of 4					
end of 2	63	3,127,381	(4,347)		148,852	(8,000)		2,226,787																										



### Step 15: Incomes Columns in SIPS: Take note of the Income Columns in SIPS.

Doe, Jane

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE: 01/01/2025  
REVISED PLAN DATE: 09/10/2025

Structured Income Planning

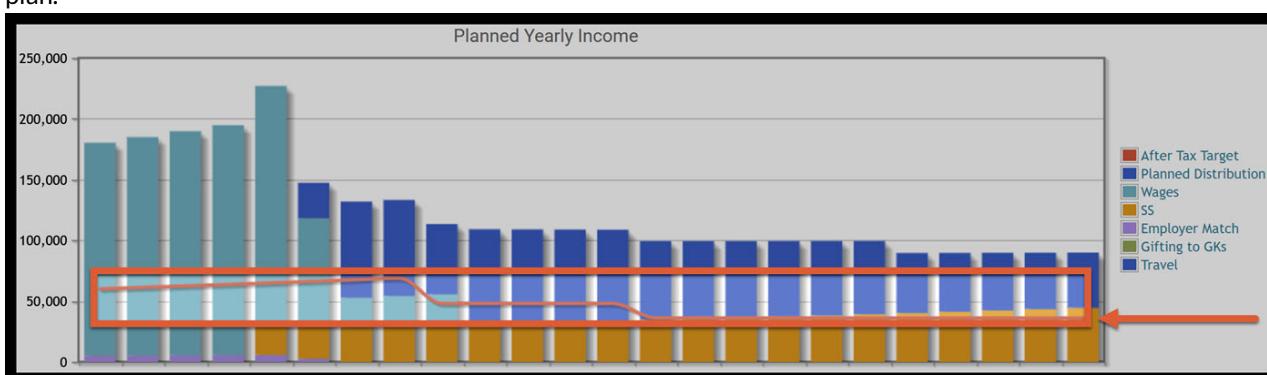
Scenario: Graphs

Planning 24 years Horizon

Accounts

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	62	2.00 %	3,000,000	3.00 %	125,000	0.00 %	5,125,000	0	Subtotal of account incomes	5,309,048	(20,298)	-0.40 %	175,000	0	5,250	(48,000)	60,000	60,000	0	end of 1
initial amount	63	3,127,381	(4,347)	148,852	(8,000)	2,226,787	(10,500)	5,503,021	(23,109)	-0.43 %	179,550	0	5,381	(48,000)	61,200	61,200	0	end of 2		
bonus % w/bonus	64	3,196,575	(6,828)	161,318	(8,000)	2,349,158	(11,032)	5,707,233	(25,860)	-0.47 %	184,218	0	5,516	(48,000)	62,424	62,424	0	end of 3		
end of 4	65	3,270,478	(9,786)	174,158	(8,000)	2,477,924	(11,308)	5,922,560	(29,994)	-0.51 %	189,008	0	5,654	(48,000)	63,672	63,672	0	end of 4		
end of 5	66	3,348,136	(12,248)	187,382	(8,000)	2,613,410	(11,590)	6,148,928	(31,838)	-0.54 %	193,922	0	5,795	(48,000)	64,946	64,946	0	end of 5		
end of 6	67	3,372,154	42,945	201,004	(8,000)	2,749,330	(5,250)	6,322,488	29,695	0.48 %	87,500	27,287	2,625	(48,000)	(25,362)	66,245	66,245	0	end of 6	
end of 7	68	3,355,964	83,632	211,034	(4,000)	2,886,797	0	6,453,795	79,632	1.26 %	24,000	27,996	0	(48,000)	(7,500)	67,570	67,570	0	end of 7	
end of 8	69	3,339,481	83,603	221,365	(4,000)	3,031,137	0	6,591,982	79,603	1.23 %	24,624	28,724	0	(48,000)	(7,500)	68,921	68,921	0	end of 8	
end of 9	70	3,347,906	58,365	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	25,264	29,471	0	(48,000)	(7,500)	48,000	48,000	0	end of 9	
end of 10	71	3,336,244	78,620	234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	0	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	0	end of 10
end of 11	72	3,325,282	77,686	241,891	0	3,508,919	0	7,076,993	77,686	1.12 %	0	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	0	end of 11
end of 12	73	3,315,048	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	0	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	0	end of 12
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	0	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	0	end of 13
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	0	33,507	0	(48,000)	(10,000)	(4,953)	36,000	36,000	0	end of 14
end of 15	76	3,324,130	63,074	250,793	10,734	4,265,174	0	7,843,654	64,854	0.85 %	0	34,378	0	(48,000)	(10,000)	(4,902)	36,000	36,000	0	end of 15
end of 16	77	3,329,297	52,741	247,046	0	4,469,368	0	8,038,674	63,693	0.81 %	0	35,227	0	(48,000)	(10,000)	(4,956)	36,000	36,000	0	end of 16
end of 17	78	3,358,276	61,554	245,546	11,244	4,702,286	0	8,204,105	62,798	0.78 %	0	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	0	end of 17
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	0	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	0	end of 18
end of 19	80	3,393,496	49,106	234,639	11,847	5,184,270	0	8,812,405	60,953	0.71 %	0	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	0	end of 19
end of 20	81	3,423,475	37,800	229,583	12,095	5,448,484	0	9,096,642	49,988	0.67 %	0	39,098	0	(48,000)	(10,000)	(5,071)	36,000	36,000	0	end of 20
end of 21	82	3,455,309	36,636	224,061	12,410	5,715,658	0	9,395,027	49,046	0.64 %	0	40,102	0	(48,000)	0	(5,148)	36,000	36,000	0	end of 21
end of 22	83	3,489,007	35,407	218,124	12,659	6,001,440	0	9,708,571	48,066	0.51 %	0	41,145	0	(48,000)	0	(5,211)	36,000	36,000	0	end of 22
end of 23	84	3,524,684	34,103	211,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	0	42,214	0	(48,000)	0	(5,301)	36,000	36,000	0	end of 23
end of 24	85	3,562,345	32,833	204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	0	43,312	0	(48,000)	0	(5,375)	36,000	36,000	0	end of 24

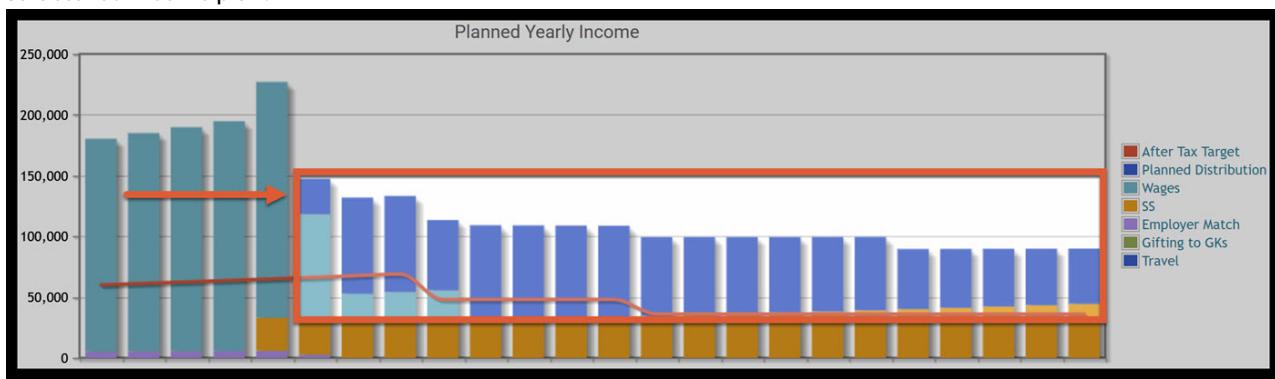
### Step 16: After Tax Target Graph: The red line represents the After-Tax Target column in the structured income plan.



Step 17: After Target Tax Column in SIPS: Take note of the After Target Tax Column in the structured income plan.

Structured Income Planning															PREPARED BY: DEMO ADVISOR														
CLIENT DASHBOARD		STRUCTURED INCOME PLANNING			CASH FLOW AND TAX ADVISOR			ASSET ALLOCATION AND NET WORTH			GRAPHS		REPORTS		TOOLS														
Scenario Graphs															INITIAL PLAN DATE: 01/01/2025														
Edit   Dynamic Mode															REVISED PLAN DATE: 09/10/2025														
Planning: 24 years																													
Horizon		BA		IRA		ROTH 401(k)			Incomes		Expenses																		
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GJs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year									
net return	62	2.00 %		3.00 %	Jane IRA	5.00 %												Infl Factor	from total income to target										
initial amount	3,000,000		125,000	2,000,000	Jane inc	0.00 %		5,125,000	Subtotal of account incomes										0.00 %										
bonus %/w/bonus	0.00 %		0.00 %	2,000,000																									
end of 1	62	3,061,798	(1,798)	136,750	(8,000)	2,110,500	(10,500)	5,039,048	(20,298)	-0.40 %	175,000	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1									
end of 2	63	3,127,381	(4,347)	148,852	(8,000)	2,226,578	(10,762)	5,003,021	(23,109)	-0.43 %	179,550	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	end of 2									
end of 3	64	3,196,757	(6,828)	161,318	(8,000)	2,349,158	(11,032)	5,070,233	(25,860)	-0.47 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	end of 3									
end of 4	65	3,270,478	(9,786)	174,158	(8,000)	2,477,924	(11,308)	5,022,560	(29,094)	-0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	0	end of 4									
end of 5	66	3,348,136	(12,248)	187,382	(8,000)	2,613,410	(11,590)	6,148,928	(31,838)	-0.54 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	end of 5									
end of 6	67	3,372,154	(2,945)	201,004	(8,000)	2,749,330	(5,250)	6,322,488	(29,695)	0.48 %	87,500	27,287	2,625	(48,000)	(7,500)	(25,362)	66,245	66,245	0	end of 6									
end of 7	68	3,355,964	83,632	211,034	(4,000)	2,886,787	0	6,453,795	79,632	1.26 %	24,000	27,996	0	(48,000)	(7,500)	(8,559)	67,570	67,570	0	end of 7									
end of 8	69	3,339,481	83,603	221,365	(4,000)	3,031,137	0	6,591,982	79,603	1.23 %	24,624	28,724	0	(48,000)	(7,500)	(8,530)	68,921	68,921	0	end of 8									
end of 9	70	3,347,900	59,355	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	29,471	0	(48,000)	(7,500)	(9,600)	48,000	48,000	0	end of 9										
end of 10	71	3,336,244	78,620	234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	0	end of 10										
end of 11	72	3,325,282	77,686	241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	0	end of 11										
end of 12	73	3,315,458	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	0	end of 12										
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	0	end of 13										
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	33,507	0	(48,000)	(10,000)	(4,933)	36,000	36,000	0	end of 14										
end of 15	76	3,329,130	53,871	250,793	10,713	4,265,511	0	7,845,036	64,584	0.85 %	34,378	0	(48,000)	(10,000)	(4,962)	36,000	36,000	0	end of 15										
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	35,272	0	(48,000)	(10,000)	(4,965)	36,000	36,000	0	end of 16										
end of 17	78	3,358,276	51,554	243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	0	end of 17										
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	0	end of 18										
end of 19	80	3,393,499	49,106	234,639	11,847	5,184,270	0	8,812,405	60,953	0.71 %	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	0	end of 19										
end of 20	81	3,423,475	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	39,086	0	(48,000)	(0)	(5,071)	36,000	36,000	0	end of 20										
end of 21	82	3,453,509	36,636	224,061	12,410	5,715,658	0	9,395,027	49,046	0.54 %	40,102	0	(48,000)	(0)	(5,148)	36,000	36,000	0	end of 21										
end of 22	83	3,489,007	35,407	218,124	12,659	6,001,440	0	9,708,571	48,066	0.51 %	41,145	0	(48,000)	(0)	(5,211)	36,000	36,000	0	end of 22										
end of 23	84	3,524,684	34,103	211,684	12,984	6,261,512	0	10,037,880	47,087	0.49 %	42,214	0	(48,000)	(0)	(5,301)	36,000	36,000	0	end of 23										
end of 24	85	3,562,345	32,833	204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	43,312	0	(48,000)	(0)	(5,375)	36,000	36,000	0	end of 24										
		1,031,959		74,107	(60,442)	1,045,523		1,083,087	659,656	0.00 %	30,221	1,152,000	(16,750)	(16,750)	(348,011)	1,150,978	1,150,978	0											

Step 18: Planned Distribution Graph: The dark blue bars represent the Planned Distribution column on the structured income plan.



Step 19: Planned Distribution Column in SIPS: Take note of the Planned Distribution Column in the structured income plan.

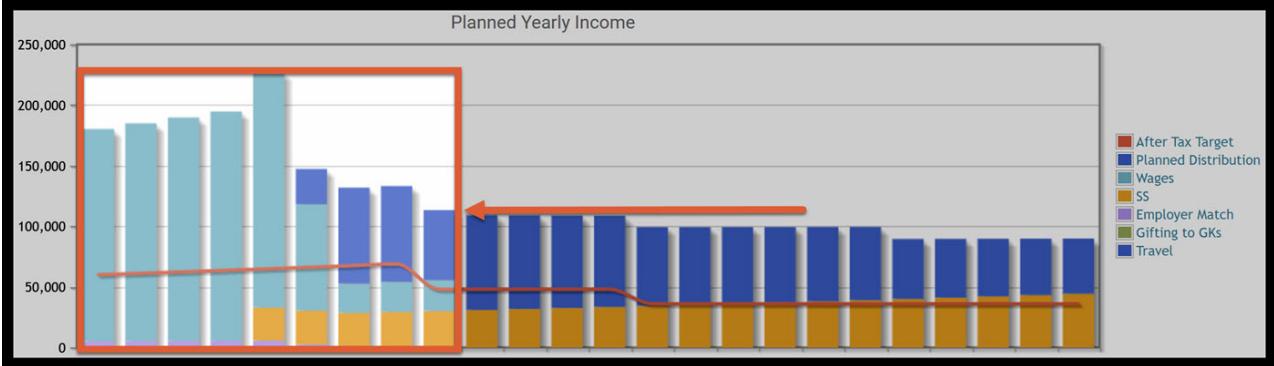
## Structured Income Planning

Edit | Dynamic Mode

Scenario | Graphs

Accounts										Incomes					Expenses							
Planning 24 years Horizon		BA		IRA		ROTH 401(k)		Accounts Total		Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	from total income to target	
net return	62	2.00 %		2.00 %		Jane IRA	5.00 %	5,125,000		2.60 %	2.60 %	2.50 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	2.00 %	
initial amount	63	3,000,000		3,000,000																		
bonus %	64	0.00 %		0.00 %		Jane Inc	0.00 %															
w/bonus	65	3,000,000		3,000,000																		
	66	3,348,136		12,248		187,382	(8,000)	2,613,410	(11,590)	6,148,920	(31,838)	193,922	0	5,795	(48,000)	(7,500)	(44,452)	60,000	60,000	60,000	0	
	67	3,372,154		42,945		201,034	(8,000)	2,749,330	(5,250)	6,322,480	29,695	87,500	27,287	2,625	(48,000)	(7,500)	(25,362)	66,245	66,245	66,245	0	
	68	3,355,964		83,632		211,034	(4,000)	2,886,797	0	6,453,795	79,632	24,000	27,996	0	(48,000)	(7,500)	(8,559)	67,570	67,570	67,570	0	
	69	3,339,481		83,603		221,365	(4,000)	3,031,137	0	6,591,982	79,603	24,624	28,724	0	(48,000)	(7,500)	(8,530)	68,921	68,921	68,921	0	
	70	3,347,790		58,365		228,006	0	3,182,694	0	6,758,605	58,365	25,264	29,471	0	(48,000)	(7,500)	(9,600)	48,000	48,000	48,000	0	
	71	3,336,244		78,620		234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	0	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	48,000	0
	72	3,325,282		77,686		241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	0	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	48,000	0
	73	3,315,048		76,740		249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	0	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	48,000	0
	74	3,305,571		75,778		256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	0	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	48,000	0
	75	3,316,668		55,014		253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	0	33,507	0	(48,000)	(10,000)	(4,953)	36,000	36,000	36,000	0
	76	3,329,130		53,871		250,793	10,713	4,265,112	0	7,845,036	64,584	0.85 %	0	34,378	0	(48,000)	(10,000)	(4,962)	36,000	36,000	36,000	0
	77	3,342,971		52,741		247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	0	35,272	0	(48,000)	(10,000)	(4,965)	36,000	36,000	36,000	0
	78	3,358,276		51,554		243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	0	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	36,000	0
	79	3,375,100		50,342		239,307	11,542	4,937,400	0	8,551,804	61,884	0.75 %	0	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	36,000	0
	80	3,360,496		49,106		234,639	11,847	5,184,270	0	8,812,075	60,953	0.71 %	0	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	36,000	0
	81	3,423,475		37,880		229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	(10,000)	(5,071)	36,000	36,000	36,000	0
	82	3,458,999		36,638		224,047	12,410	5,715,638	0	9,395,072	49,946	0.54 %	0	40,102	0	(48,000)	(10,000)	(5,148)	36,000	36,000	36,000	0
	83	3,489,207		35,307		217,124	12,659	6,000,149	0	9,708,571	49,895	0.51 %	0	41,151	0	(48,000)	(10,000)	(5,197)	36,000	36,000	36,000	0
	84	3,524,684		34,103		211,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	0	42,214	0	(48,000)	(10,000)	(5,301)	36,000	36,000	36,000	0
	85	3,562,345		32,833		204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	0	43,312	0	(48,000)	(10,000)	(5,375)	36,000	36,000	36,000	0

Step 20: Wages Graph: The light blue bars represent the Wages column on the structured income plan.



Step 21: Wages Column in SIPS: Take note of the Wages Column in the structured income plan.

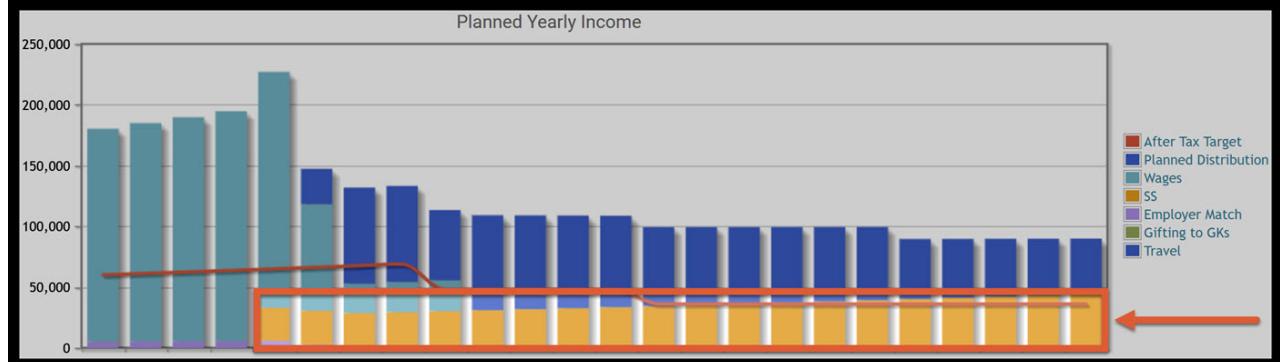
## Structured Income Planning

Edit | Dynamic Mode

Scenario | Graphs

Accounts										Incomes					Expenses																		
Planning 24 years Horizon		BA		IRA		ROTH 401(k)		Accounts Total		Planned Distribution		Percent Distribution		Wages		SS		Employer Match		Gifting to GKs		Travel		Approx Income Tax		After Tax Income		After Tax Target		Income Gap		Year	
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap														
net return	62	2.00 %		2.00 %		Jane IRA	5.00 %																										
initial amount	63	3,000.000		3,000.000				5,125,000																									
bonus %	64	0.00 %		0.00 %		Jane inc	0.00 %																										
w/bonus	65	3,000.000		3,000.000				5,125,000																									
	66	3,348,136		(12,248)		187,382	(8,000)	6,148,920	(31,838)																								
	67	3,372,154		42,945		201,004	(8,000)	2,749,330	(5,250)	6,322,480	29,695	87,500	2,287	2,625	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1												
	68	3,355,964		83,632		211,034	(4,000)	2,886,797	0	6,453,795	79,632	24,000	27,996	0	(48,000)	(7,500)	(8,559)	67,570	67,570	0	end of 2												
	69	3,339,481		83,603		221,365	(4,000)	3,031,137	0	6,591,982	79,603	24,624	28,724	0	(48,000)	(7,500)	(8,530)	68,921	68,921	0	end of 3												
	70	3,347,790		58,365		228,006	0	3,182,694	0	6,758,605	58,365	25,264	29,471	0	(48,000)	(7,500)	(9,600)	48,000	48,000	0	end of 4												
	71	3,336,244		78,620		234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	0	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	0	end of 5											
	72	3,325,282		77,686		241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	0	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	0	end of 6											
	73	3,315,048		76,740		249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	0	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	0	end of 7											
	74	3,305,571		75,778		256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	0	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	0	end of 8											
	75	3,316,668		55,014		253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	0	33,507	0	(48,000)	(10,000)	(4,953)	36,000	36,000	0	end of 9											
	76	3,329,130		53,871		250,793	10,713	4,265,112	0	7,845,036	64,584	0.85 %	0	34,378	0	(48,000)	(10,000)	(4,962)	36,000	36,000	0	end of 10											
	77	3,342,971		52,741		247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	0	35,272	0	(48,000)	(10,000)	(4,965)	36,000	36,000	0	end of 11											
	78	3,355,276		51,554		243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	0	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	0	end of 12											
	79	3,375,100		50,342		239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	0	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	0	end of 13											
	80	3,360,496		49,106		234,639	11,847	5,184,270	0	8,812,015	60,953	0.71 %	0	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	0	end of 14											
	81	3,423,475		37,880		229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	(10,000)	(5,071)	36,000	36,000	0	end of 15											
	82	3,458,999		36,638		224,047	12,410	5,715,638	0	9,395,072	49,946	0.54 %	0	40,102	0	(48,000)	(10,000)	(5,148)	36,000	36,000	0	end of 16											
	83	3,489,007		35,407		217,124	12,659	6,009,149	0	9,708,571	48,895	0.51 %	0	41,151	0	(48,000)	(10,000)	(5,197)	36,000	36,000	0	end of 17											
	84	3,524,684		34,103		211,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	0	42,214	0	(48,000)	(10,000)	(5,301)	36,000	36,000	0	end of 18											
	85	3,562,345		32,833		204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	0	43,312	0	(48,000)	(10,000)	(5,375)	36,000	36,000	0	end of 19											
	86	1,031,859		74,107		(60,442)		1,045,523		1,083,087	659,658	30,221	(1,152,000)	(167,500)	(348,011)	(1,150,978)	0	1,150,978	0														

Step 22: SS Graph: The gold bars represent the SS column on the structured income plan.



Step 23: SS Column in SIPS: Take note of the SS Column in the structured income plan.

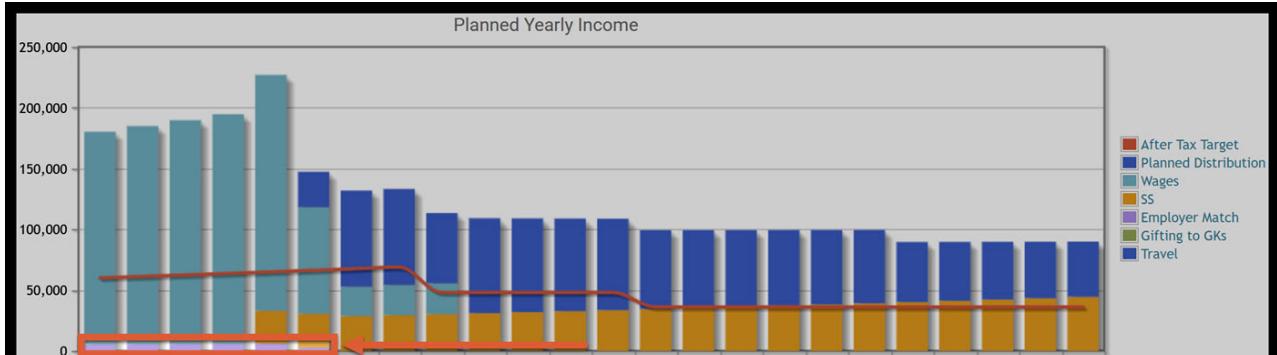
## Structured Income Planning

Edit | Dynamic Mode

Scenario | Graphs

Accounts				Incomes				Expenses				SS		Employer Match		Gifting to GKS		Travel		Approx Income Tax		After Tax Income		After Tax Target		Income Gap		Year
Planning Horizon		BA		IRA		ROTH 401(k)		Wages		SS		Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor	from total income to target	Year		
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKS	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	from total income to target	Year							
net return	62	2.00 %		2.00 %		Jane IRA	5.00 %																					
initial amount		3,000.000		125,000		Jane Inc	2,000.000																					
bonus % w/bonus		0.00 %		0.00 %			0.00 %																					
		3,000.000		125,000			2,000.000																					
end of 1	62	3,061,798	(1,798)	136,750	(8,000)	2,110,500	(10,500)	5,309,048	(20,298)	-0.40 %	175,000	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1								
end of 2	63	3,127,381	(4,347)	148,852	(8,000)	2,226,787	(10,762)	5,503,021	(23,109)	-0.43 %	179,550	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	end of 2								
end of 3	64	3,196,757	(6,828)	161,318	(8,000)	2,349,158	(11,032)	5,707,233	(25,860)	-0.47 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	end of 3								
end of 4	65	3,270,478	(9,786)	174,158	(8,000)	2,477,924	(11,308)	5,922,560	(29,094)	-0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	0	end of 4								
end of 5	66	3,348,136	(12,248)	187,382	(8,000)	2,613,410	(11,590)	6,148,920	(31,838)	-0.54 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	end of 5								
end of 6	67	3,372,154	(42,945)	201,004	(8,000)	2,749,330	(5,250)	6,322,488	(29,695)	0.48 %	87,500	27,287	2,625	(48,000)	(7,500)	(25,362)	66,245	66,245	0	end of 6								
end of 7	68	3,355,964	83,632	211,034	(4,000)	2,886,797	0	6,453,795	79,632	1.26 %	24,000	27,996	0	(48,000)	(7,500)	(8,559)	67,570	67,570	0	end of 7								
end of 8	69	3,339,481	83,603	221,365	(4,000)	3,031,137	0	6,591,982	79,603	1.23 %	24,624	28,724	0	(48,000)	(7,500)	(8,530)	68,921	68,921	0	end of 8								
end of 9	70	3,347,904	58,365	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	25,264	29,471	0	(48,000)	(7,500)	(9,600)	48,000	48,000	0	end of 9								
end of 10	71	3,336,244	78,620	234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	0	end of 10									
end of 11	72	3,325,282	77,686	241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	0	end of 11									
end of 12	73	3,315,048	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	0	end of 12									
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	0	end of 13									
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	33,507	0	(48,000)	(10,000)	(4,953)	36,000	36,000	0	end of 14									
end of 15	76	3,329,130	53,871	250,793	(10,713)	4,265,112	0	7,845,036	64,584	0.85 %	34,378	0	(48,000)	(10,000)	(4,962)	36,000	36,000	0	end of 15									
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	35,272	0	(48,000)	(10,000)	(4,965)	36,000	36,000	0	end of 16									
end of 17	78	3,355,276	51,554	243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	0	end of 17									
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	0	end of 18									
end of 19	80	3,360,496	49,106	234,639	11,847	5,184,270	0	8,812,615	60,953	0.71 %	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	0	end of 19									
end of 20	81	3,423,475	37,880	229,583	12,095	5,444,344	0	9,096,542	49,985	0.57 %	39,086	0	(48,000)	(10,000)	(5,071)	36,000	36,000	0	end of 20									
end of 21	82	3,458,999	36,638	224,907	12,410	5,715,638	0	9,395,072	49,946	0.54 %	40,102	0	(48,000)	(10,000)	(5,148)	36,000	36,000	0	end of 21									
end of 22	83	3,489,407	35,407	217,124	12,629	6,000,149	0	9,708,571	49,895	0.51 %	41,154	0	(48,000)	(10,000)	(5,219)	36,000	36,000	0	end of 22									
end of 23	84	3,524,684	34,103	211,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	42,214	0	(48,000)	(10,000)	(5,301)	36,000	36,000	0	end of 23									
end of 24	85	3,562,345	32,833	204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	43,312	0	(48,000)	(10,000)	(5,375)	36,000	36,000	0	end of 24									

Step 24: Employer Match Graph: The purple bars represent the Employer Match of the ROTH 401(K) column on the structured income plan.



Step 25: Employer Match Column in SIPS: Take note of the Employer Match Column in the structured income plan.

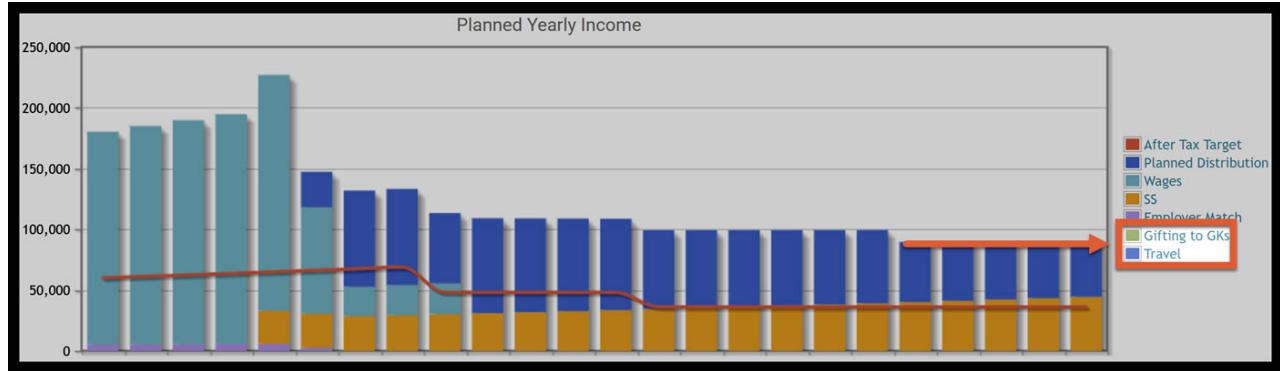
## Structured Income Planning

Edit Dynamic Mode

Scenario			Graphs																								
			Accounts								Incomes								Expenses								
Planning Horizon		24 years	BA		IRA		ROTH 401(k)		Subtotal of account incomes				Wages		SS		Employer Match		Gifting to GIs		Travel		Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year
Year	Jane	Account	Income	Account	Income	Account	Income	Account Total	Planned Distribution	Percent Distribution																	
net return	62	2.00 %			3.00 %																						
initial amount		3,000,000			125,000																						
bonus %		0.00 %			0.00 %																						
w/bonus		3,000,000			125,000																						
end of 1	62	3,061,798	(1,798)	136,750	(8,000)	2,110,500	(10,500)	5,309,048	(20,298)	-0.40 %	175,000	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	0							
end of 2	63	3,127,381	(4,347)	148,852	(8,000)	2,226,787	(10,762)	5,503,021	(23,109)	-0.43 %	179,550	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	0							
end of 3	64	3,195,571	(6,828)	161,318	(8,000)	2,346,158	(11,032)	5,697,838	(25,910)	-0.46 %	184,000	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	0							
end of 4	65	3,263,761	(9,309)	174,880	(8,000)	2,477,424	(11,308)	5,892,560	(29,049)	-0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,797)	63,672	63,672	0	0							
end of 5	66	3,348,136	(10,849)	187,382	(8,000)	2,613,410	(11,590)	6,088,288	(31,838)	-0.54 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	0							
end of 6	67	3,372,754	(42,945)	201,004	(8,000)	2,749,330	(5,250)	6,222,468	(39,695)	-0.46 %	187,500	0	5,935	(48,000)	(7,500)	(25,362)	66,245	66,245	0	0							
end of 7	68	3,355,964	63,632	211,034	(4,000)	2,886,797	(6,453)	6,365,795	(79,632)	-1.26 %	24,000	0	27,996	(48,000)	(7,500)	(8,559)	67,570	67,570	0	0							
end of 8	69	3,339,481	83,602	221,365	(4,000)	3,031,137	(6,591)	6,519,822	(79,632)	-1.23 %	24,624	0	28,724	(48,000)	(7,500)	(8,530)	68,921	68,921	0	0							
end of 9	70	3,347,906	58,365	228,000	0	3,182,694	(5,758)	6,585,605	(58,365)	-0.89 %	25,264	0	29,471	(48,000)	(7,500)	(9,600)	48,000	48,000	0	0							
end of 10	71	3,336,244	78,620	234,846	0	3,341,828	(6,912)	6,912,918	(78,620)	-1.16 %	0	30,237	0	29,480	(48,000)	(10,000)	(2,857)	48,000	48,000	0	0						
end of 11	72	3,325,282	77,696	241,891	0	3,508,919	(7,076)	6,093,073	(77,686)	-1.12 %	0	31,024	0	28,000	(48,000)	(10,000)	(2,710)	48,000	48,000	0	0						
end of 12	73	3,315,048	76,740	249,148	0	3,684,365	(72,486)	6,274,562	(76,740)	-1.09 %	0	31,830	0	28,000	(48,000)	(10,000)	(2,570)	48,000	48,000	0	0						
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	(74,430)	6,470,776	(75,778)	-1.05 %	0	32,658	0	28,000	(48,000)	(10,000)	(2,436)	48,000	48,000	0	0						
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	(76,527)	6,546,454	(75,270)	-0.88 %	0	33,507	0	28,000	(48,000)	(10,000)	(4,953)	36,000	36,000	0	0						
end of 15	76	3,329,130	53,871	250,793	10,713	4,265,112	(76,454)	6,745,836	(74,378)	-0.85 %	0	34,378	0	28,000	(48,000)	(10,000)	(4,962)	36,000	36,000	0	0						
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	(8,068)	6,939,704	(63,693)	0.81 %	0	35,272	0	28,000	(48,000)	(10,000)	(4,965)	36,000	36,000	0	0						
end of 17	78	3,358,272	51,554	243,543	11,244	4,702,286	(8,304)	7,105,405	(62,798)	0.78 %	0	36,189	0	28,000	(48,000)	(10,000)	(4,987)	36,000	36,000	0	0						
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	(8,551)	7,184,006	(61,884)	0.75 %	0	37,130	0	28,000	(48,000)	(10,000)	(5,014)	36,000	36,000	0	0						
end of 19	80	3,393,496	49,106	234,639	11,847	5,184,270	(8,812)	7,380,405	(60,953)	0.71 %	0	38,095	0	28,000	(48,000)	(10,000)	(5,048)	36,000	36,000	0	0						
end of 20	81	3,423,475	37,890	229,583	12,095	5,443,484	(9,096)	7,546,542	(64,995)	0.57 %	0	39,086	0	28,000	(48,000)	(10,000)	(5,071)	36,000	36,000	0	0						
end of 21	82	3,455,309	36,401	224,061	12,410	5,715,658	(9,395)	7,759,027	(69,946)	0.54 %	0	40,102	0	28,000	(48,000)	(10,000)	(5,148)	36,000	36,000	0	0						
end of 22	83	3,489,007	35,407	218,124	12,648	6,001,440	(9,708)	8,051,738	(70,465)	0.51 %	0	41,145	0	28,000	(48,000)	(10,000)	(5,211)	36,000	36,000	0	0						
end of 23	84	3,524,684	34,108	211,684	12,964	6,301,512	(9,807)	8,357,880	(70,467)	0.49 %	0	42,214	0	28,000	(48,000)	(10,000)	(5,301)	36,000	36,000	0	0						
end of 24	85	3,562,345	32,283	204,894	13,230	6,616,587	(10,383)	8,736,736	(66,063)	0.46 %	0	43,312	0	28,000	(48,000)	(10,000)	(5,375)	36,000	36,000	0	0						

Step 26: Gifting to GKs and Travel Graph: Gifting to GKs and Travel are yearly expenses represented in the key.

Note that they are not represented in this graph since they are negative amounts.



Step 27: Gifting to GKs and Travel Column in SIPS: Take note of the Gifting to GKs and Travel Columns.

## Structured Income Planning

Edit Dynamic Mode

Scenario Graphs

Planning Horizon	24 years	Accounts						Incomes				Expenses				Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
		BA		IRA		ROTH 401(k)		Subtotal of account incomes		Wages	SS	Employer Match	Gifting to GKS	Travel	Infl Factor 2.00 %					
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKS	Travel	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	62	2.00 %	3.00 %	3.00 %	5.00 %															
initial amount		3,000,000		125,000		Jane IRA	5.00 %													
bonus % w/bonus		0.00 %		0.00 %		Jane Inc	0.00 %													
		3,000,000		125,000			2,000,000													
							2,000,000													
								5,125,000												
end of 1	62	3,061,798	(1,798)	136,750	(8,000)	2,110,500	(10,500)	5,309,048	(20,298)	-0.40 %	175,000	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1
end of 2	63	3,127,381	(4,347)	148,852	(8,000)	2,267,787	(10,762)	5,305,021	(23,109)	-0.43 %	179,550	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	end of 2
end of 3	64	3,196,757	(6,828)	161,318	(8,000)	2,349,158	(11,032)	5,707,233	(25,860)	-0.47 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	end of 3
end of 4	65	3,270,478	(9,786)	174,158	(8,000)	2,477,924	(11,308)	5,922,560	(29,094)	-0.51 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	0	end of 4
end of 5	66	3,348,136	(12,484)	187,382	(8,000)	2,613,410	(11,590)	6,193,928	(31,838)	-0.55 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	end of 5
end of 6	67	3,372,425	(14,204)	204,000	(8,000)	2,750,886	(5,250)	6,329,886	(29,695)	-0.58 %	187,500	0	5,925	(27,292)	(2,625)	(25,862)	65,245	65,245	0	end of 6
end of 7	68	3,395,964	(6,632)	211,038	(4,000)	2,886,797	(5,432)	6,453,795	(29,332)	-0.62 %	24,000	0	27,996	(48,000)	(7,500)	(28,602)	67,570	67,570	0	end of 7
end of 8	69	3,399,481	83,603	221,365	(4,000)	3,031,137	0	5,911,592	79,603	1.23 %	24,624	0	28,724	(48,000)	(7,500)	(8,530)	68,921	68,921	0	end of 8
end of 9	70	3,374,906	58,365	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	25,264	0	29,471	(48,000)	(7,500)	(9,600)	48,000	48,000	0	end of 9
end of 10	71	3,326,244	78,620	234,846	0	3,341,298	0	6,912,918	78,620	1.16 %	0	0	30,237	(48,000)	(10,000)	(2,857)	48,000	48,000	0	end of 10
end of 11	72	3,325,282	77,698	241,891	0	3,350,919	0	7,076,093	77,686	1.12 %	0	0	31,024	(48,000)	(10,000)	(2,710)	48,000	48,000	0	end of 11
end of 12	73	3,315,048	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	0	0	31,830	(48,000)	(10,000)	(2,570)	48,000	48,000	0	end of 12
end of 13	74	3,305,571	75,778	256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	0	0	32,658	(48,000)	(10,000)	(2,436)	48,000	48,000	0	end of 13
end of 14	75	3,316,668	55,014	253,889	10,432	4,062,012	0	7,652,570	65,446	0.88 %	0	0	33,507	(48,000)	(10,000)	(4,953)	36,000	36,000	0	end of 14
end of 15	76	3,329,130	53,871	250,793	10,173	4,265,112	0	7,845,036	64,584	0.85 %	0	0	34,378	(48,000)	(10,000)	(4,962)	36,000	36,000	0	end of 15
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	0	0	35,272	(48,000)	(10,000)	(4,965)	36,000	36,000	0	end of 16
end of 17	78	3,358,276	51,554	245,543	12,444	4,702,286	0	8,304,105	62,798	0.78 %	0	0	36,189	(48,000)	(10,000)	(4,987)	36,000	36,000	0	end of 17
end of 18	79	3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	0	0	37,130	(48,000)	(10,000)	(5,014)	36,000	36,000	0	end of 18
end of 19	80	3,393,496	49,106	234,639	11,847	5,184,270	0	8,812,405	60,953	0.71 %	0	0	38,095	(48,000)	(10,000)	(5,048)	36,000	36,000	0	end of 19
end of 20	81	3,423,475	37,894	229,583	12,995	5,443,484	0	9,096,542	49,985	0.57 %	0	0	39,086	(48,000)	(10,000)	(5,071)	36,000	36,000	0	end of 20
end of 21	82	3,455,309	36,636	24,061	12,410	5,715,658	0	9,395,027	49,046	0.54 %	0	0	40,102	(48,000)	0	(5,148)	36,000	36,000	0	end of 21
end of 22	83	3,489,007	35,407	218,124	12,659	6,001,440	0	9,708,571	48,066	0.51 %	0	0	41,145	(48,000)	0	(5,211)	36,000	36,000	0	end of 22
end of 23	84	3,524,684	34,103	211,684	12,694	6,301,512	0	10,037,880	47,087	0.49 %	0	0	42,214	(48,000)	0	(5,301)	36,000	36,000	0	end of 23
end of 24	85	3,562,345	32,833	204,804	13,230	6,616,587	0	10,385,736	46,063	0.46 %	0	0	43,312	(48,000)	0	(5,375)	36,000	36,000	0	end of 24

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](mailto:support@planscout.com).