

Planned Yearly Income Graph

09/29/2025 3:15 pm EDT

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.

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, Jane	01/01/2025	09/10/2025	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, Jane

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: 09/10/2025

Client Information

Edit Goto Incomes >>

Case Title: Doe, Jane
Description:

Selection tags: Demo Advisor Active ☒

Client one

Last: Doe First: Jane
Date of birth: 01/01/1963 Initial plan age: 62
Current age: 62 Retirement age: 67
Gender: Female

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: 09/10/2025
Address:
City, State, Zip:
Email:
Phone:
Cell Phone:

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

Doe, Jane

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

Structured Income Planning

EditDynamic Mode

ScenarioGraphs

PREPARED BY: DEMO ADVISOR

INITIAL PLAN DATE: 01/01/2025

REVISED PLAN DATE: 09/10/2025

Accounts								Incomes					Expenses								
Planning 24 years Horizon																					
BA								IRA					ROTH 401(k)								
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 %		5,125,000													
initial amount		3,000,000		125,000	Jane inc	2,000,000		5,125,000	Subtotal of account incomes											from total income to target	
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0			Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor						
		3,000,000		125,000		2,000,000		5,125,000			2.60 %	2.60 %	2.50 %	0.00 %	0.00 %					2.00 %	
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)	6,148,928	(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)	6,322,488	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	3,347,906	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	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	7,076,093	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	3,329,130	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 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	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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	
		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	1,150,978	0		

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

Doe, Jane

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

Structured Income Planning

Dynamic Mode

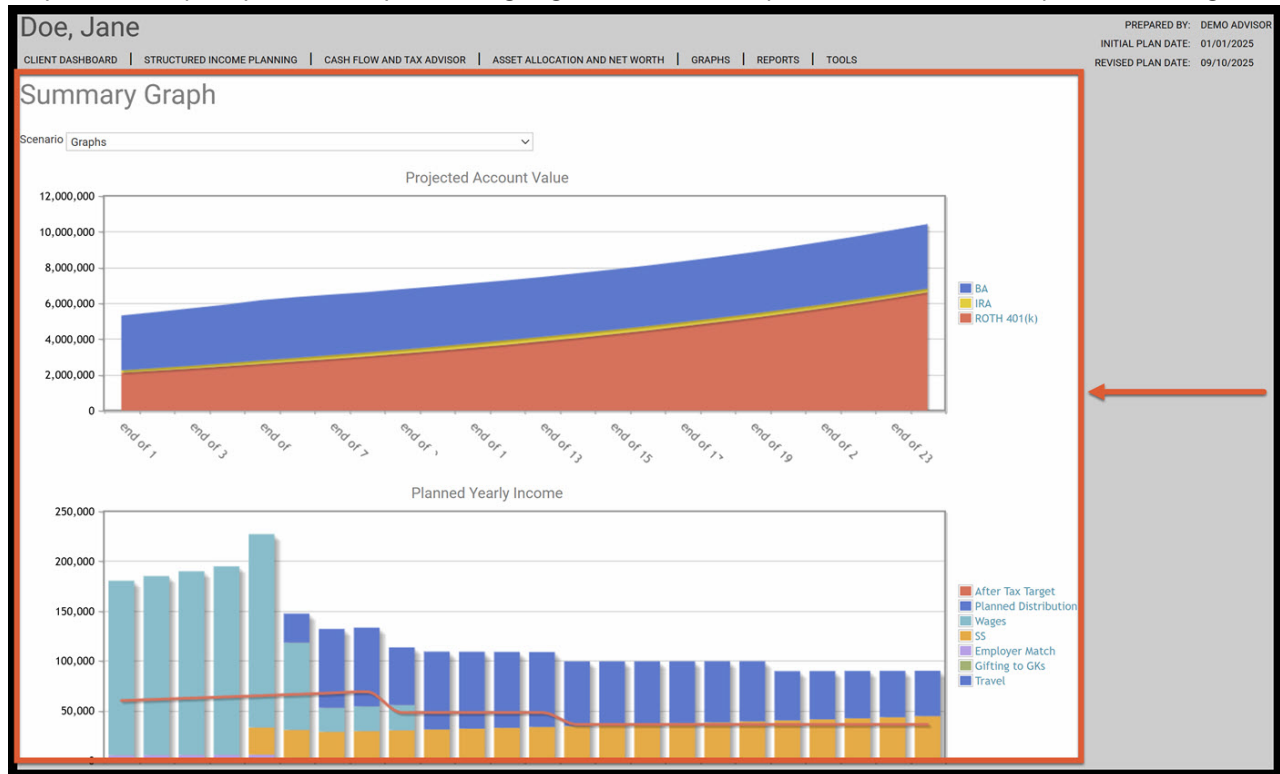
Scenario | Graphs

PREPARED BY: DEMO ADVISOR

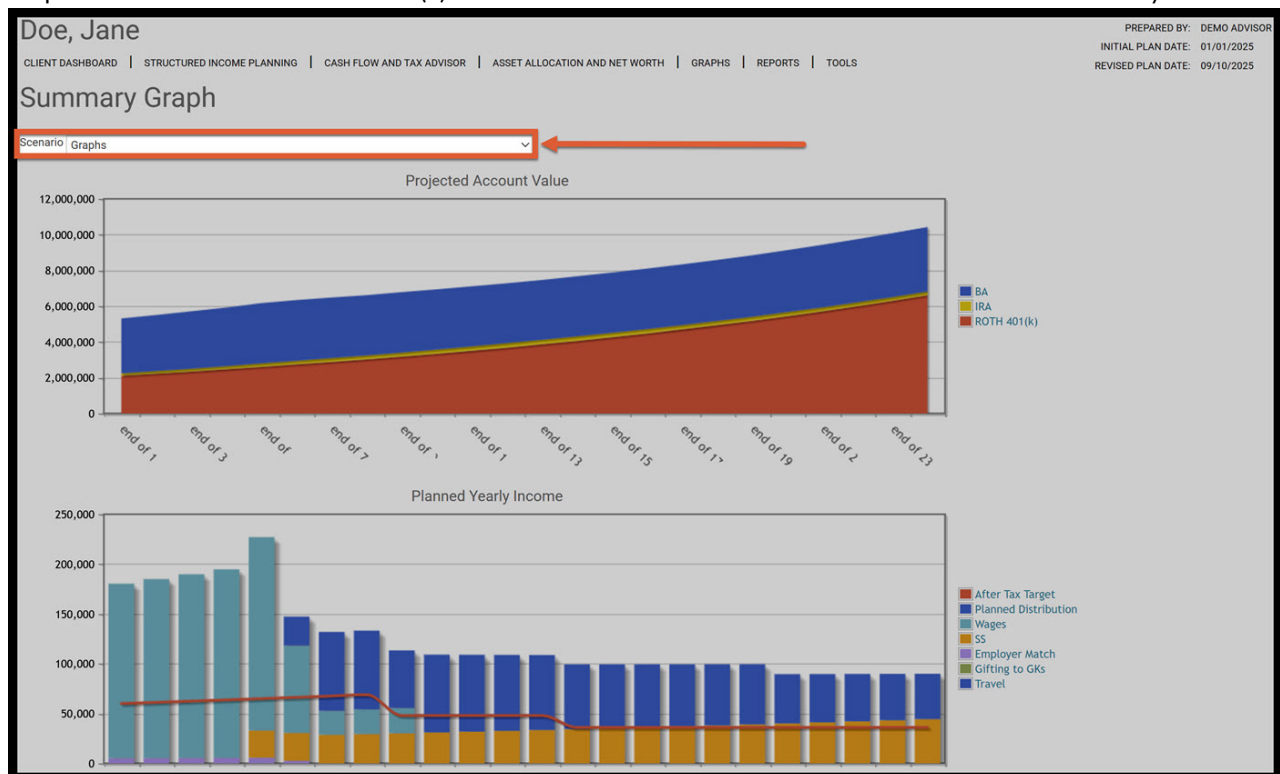
INITIAL PLAN DATE: 01/01/2025

REVISED PLAN DATE: 09/10/2025

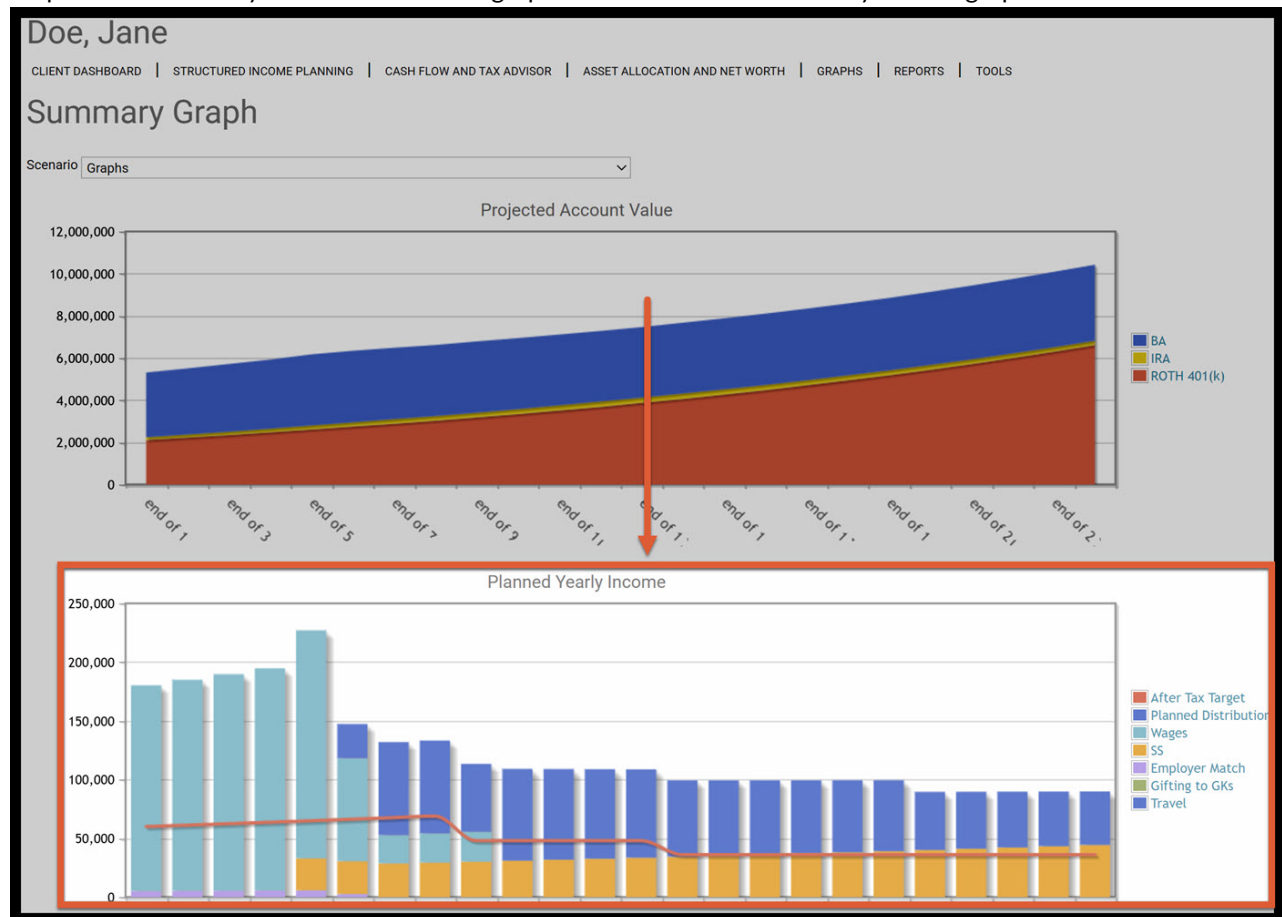
Step 6: Summary Graphs: The Graphs Landing Page will automatically show the scenario that you are working in.



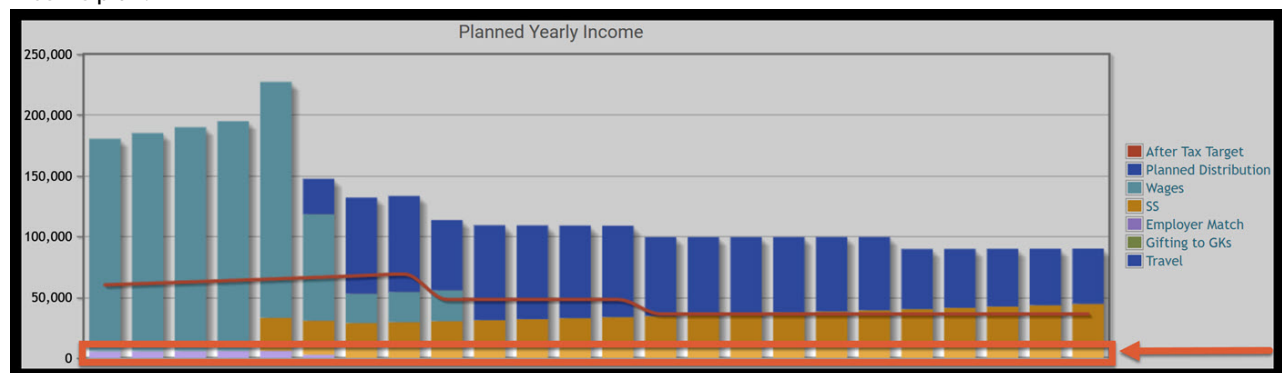
Step 7: Scenario: Use the down caret (v) arrow to select the correct scenario if it is not the correct one by default.



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.

Doe, Jane

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: 09/10/2025

Structured Income Planning

Edit

Dynamic Mode

Scenario

Graphs

Planning 24 years

Horizon

Accounts

BA

IRA

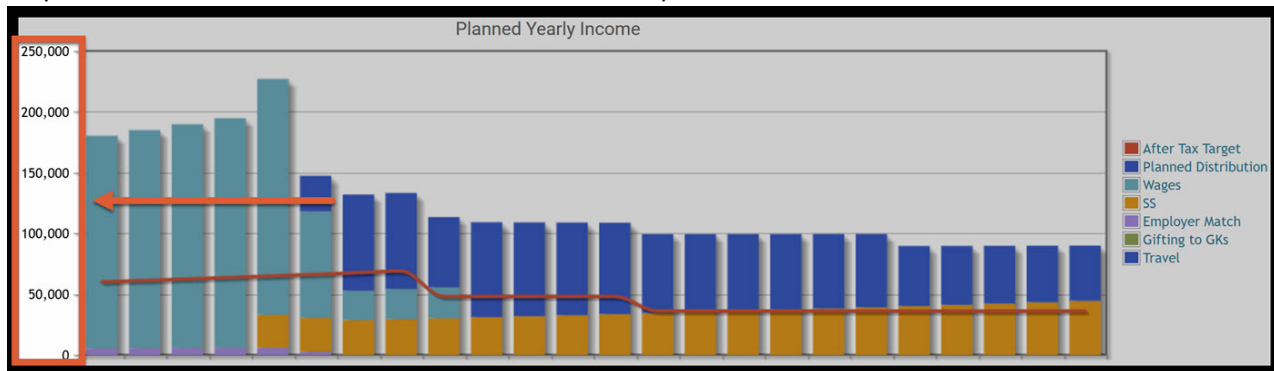
ROTH 401(k)

Incomes

Expenses

Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifts 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		125,000		2,000,000		5,125,000												
w/bonus		3,000,000		125,000	Jane Inc	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)	2,226,787	(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)	6,148,928	(31,836)	-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	3,347,906	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	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	7,076,093	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	3,329,130	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 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	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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
		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	1,150,978	0	

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.

Doe, Jane

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: 09/10/2025

Structured Income Planning

Edit

Dynamic Mode

Scenario

Graphs

Planning Horizon

24 years

Accounts

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 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 %		5,125,000												
initial amount		3,000,000	125,000	2,000,000		2,000,000		5,125,000												
bonus %		0.00 %	0.00 %	0.00 %	Jane inc	0.00 %		0												
w/bonus		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)	2,226,787	(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)	6,148,928	(31,838)	-0.54 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	end of 5
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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	3,347,906	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	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	7,076,093	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	3,329,130	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 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	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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
		1,031,859		74,107		(60,442)		1,045,523			1,083,087	659,858	30,221	(1,152,000)	(167,500)	(348,011)	1,150,978	1,150,978	0	

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

Doe, Jane

CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

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PREPARED BY: DEMO ADVISOR

INITIAL PLAN DATE: 01/01/2025

REVISED PLAN DATE: 09/10/2025

Structured Income Planning

Edit

Dynamic Mode

Scenario

Graphs

Planning Horizon

24 years

Accounts

BA

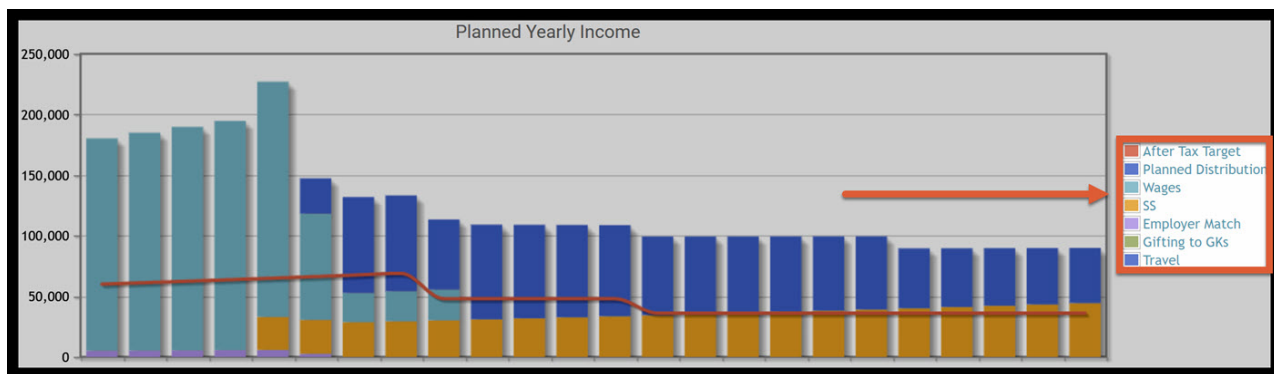
IRA

ROTH 401(k)

Incomes

Expenses

Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Grouped	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 %		5,125,000											
initial amount		3,000,000	125,000	2,000,000		2,000,000		5,125,000											
bonus %		0.00 %	0.00 %	0.00 %	Jane inc	0.00 %		0											
w/bonus		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 %	180,250	(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 %	184,931	(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 %	189,734	(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 %	194,662	(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 %	199,717	(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 %	117,412	(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 %	51,996	(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 %	53,348	(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	0	6,758,605	58,365	0.89 %	54,735	(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	(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	(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	(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	(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	(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	(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	(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	(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	(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 %	38,095	(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	(48,000)	0	(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	0.54 %	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 %	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	12,984	6,301,512	0	10,037,880	47,087	0.49 %	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	10,383,736	46,063	0.46 %	43,312	(48,000)	0	(5,375)	36,000	36,000	0	end of 24	
		1,031,859		74,107		(60,442)		1,045,523			1,772,966	(1,152,000)	(167,500)	(348,011)	1,150,978		1,150,978	0	



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

Doe, Jane

CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

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PREPARED BY: DEMO ADVISOR

INITIAL PLAN DATE: 01/01/2025

REVISED PLAN DATE: 09/10/2025

Structured Income Planning

Edit

Dynamic Mode

Scenario

Graphs

Planning Horizon

24 years

Accounts

BA

IRA

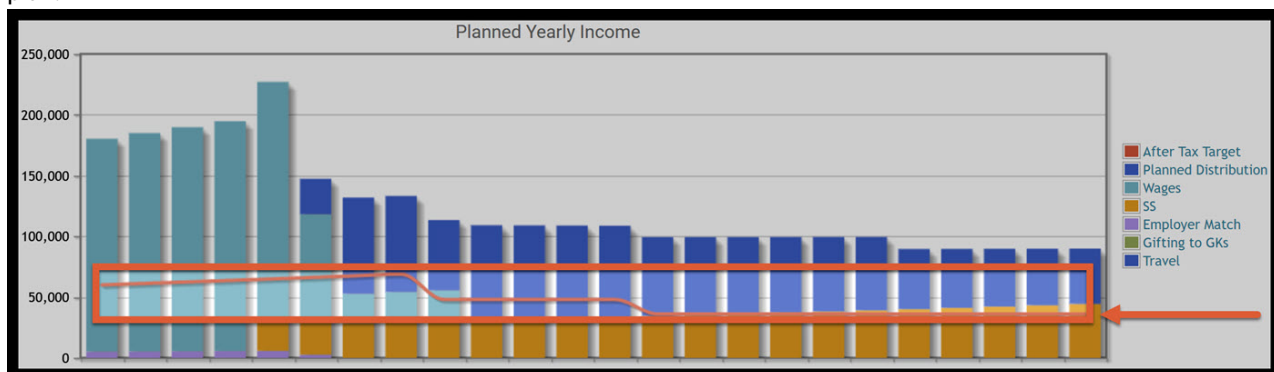
ROTH 401(K)

Incomes

Expenses

Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to GKs	Travel	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	62	2.00 %	3,000,000	125,000	3.00 %	Jane IRA	2,000,000	5,125,000	0	Subtotal of account incomes	175,000	2,60 %	0	5,250	(48,000)	(7,500)	(44,452)	60,000	60,000	0	end of 1
initial amount	63	0.00 %	3,000,000	0.00 %	0.00 %	Jane inc	2,000,000	5,125,000	0		179,550	0	5,381	(48,000)	(7,500)	(45,122)	61,200	61,200	0	end of 2	
w/bonus	64		3,127,381	(4,347)	148,852	(8,000)	2,226,787	(10,762)	5,503,021	(23,109)	-0.43 %	184,218	0	5,516	(48,000)	(7,500)	(45,950)	62,424	62,424	0	end of 3
end of 1	65		3,196,757	(6,828)	161,318	(8,000)	2,349,158	(11,032)	5,707,233	(25,860)	-0.47 %	189,008	0	5,654	(48,000)	(7,500)	(46,395)	63,672	63,672	0	end of 4
end of 2	66		3,270,478	(9,786)	174,158	(8,000)	2,477,924	(11,308)	5,922,560	(29,094)	-0.51 %	193,922	0	5,795	(48,000)	(7,500)	(47,433)	64,946	64,946	0	end of 5
end of 3	67		3,348,136	(12,248)	187,382	(8,000)	2,613,410	(11,590)	6,148,928	(31,838)	-0.54 %	87,500	27,287	2,625	(48,000)	(7,500)	(25,362)	66,245	66,245	0	end of 6
end of 4	68		3,372,154	42,945	201,004	(8,000)	2,749,330	(5,250)	6,322,488	29,695	0.48 %	24,000	27,996	0	(48,000)	(7,500)	(8,559)	67,570	67,570	0	end of 7
end of 5	69		3,355,964	83,632	211,034	(8,000)	2,866,797	0	6,453,795	79,632	1.26 %	24,624	28,724	0	(48,000)	(7,500)	(8,530)	68,921	68,921	0	end of 8
end of 6	70		3,339,481	83,603	221,365	(4,000)	3,031,137	0	6,591,982	79,603	1.23 %	25,264	29,471	0	(48,000)	(7,500)	(9,600)	48,000	48,000	0	end of 9
end of 7	71		3,347,906	58,365	228,006	0	3,182,694	0	6,758,605	58,365	0.89 %	0	30,237	0	(48,000)	(10,000)	(2,857)	48,000	48,000	0	end of 10
end of 8	72		3,336,244	78,620	234,846	0	3,341,828	0	6,912,918	78,620	1.16 %	0	31,024	0	(48,000)	(10,000)	(2,710)	48,000	48,000	0	end of 11
end of 9	73		3,325,282	77,686	241,891	0	3,508,919	0	7,076,093	77,686	1.12 %	0	31,830	0	(48,000)	(10,000)	(2,570)	48,000	48,000	0	end of 12
end of 10	74		3,315,048	76,740	249,148	0	3,684,365	0	7,248,562	76,740	1.09 %	0	32,658	0	(48,000)	(10,000)	(2,436)	48,000	48,000	0	end of 13
end of 11	75		3,305,571	75,778	256,623	0	3,868,583	0	7,430,776	75,778	1.05 %	0	33,507	0	(48,000)	(10,000)	(4,953)	36,000	36,000	0	end of 14
end of 12	76		3,316,668	55,014	253,889	10,432	4,062,012	0	7,632,570	65,446	0.88 %	0	34,378	0	(48,000)	(10,000)	(4,962)	36,000	36,000	0	end of 15
end of 13	77		3,329,130	53,871	250,793	10,713	4,265,112	0	7,845,036	64,584	0.85 %	0	35,272	0	(48,000)	(10,000)	(4,965)	36,000	36,000	0	end of 16
end of 14	78		3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,693	0.81 %	0	36,189	0	(48,000)	(10,000)	(4,987)	36,000	36,000	0	end of 17
end of 15	79		3,358,276	51,554	243,543	11,244	4,702,286	0	8,304,105	62,798	0.78 %	0	37,130	0	(48,000)	(10,000)	(5,014)	36,000	36,000	0	end of 18
end of 16	80		3,375,100	50,342	239,307	11,542	4,937,400	0	8,551,806	61,884	0.75 %	0	38,095	0	(48,000)	(10,000)	(5,048)	36,000	36,000	0	end of 19
end of 17	81		3,393,496	49,106	234,639	11,847	5,184,270	0	8,812,405	60,953	0.71 %	0	39,086	0	(48,000)	0	(5,071)	36,000	36,000	0	end of 20
end of 18	82		3,423,475	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	40,102	0	(48,000)	0	(5,148)	36,000	36,000	0	end of 21
end of 19	83		3,455,309	36,636	224,061	12,410	5,715,568	0	9,395,027	49,046	0.54 %	0	41,145	0	(48,000)	0	(5,211)	36,000	36,000	0	end of 22
end of 20	84		3,489,007	35,407	218,124	12,659	6,001,440	0	9,708,571	48,066	0.51 %	0	42,214	0	(48,000)	0	(5,301)	36,000	36,000	0	end of 23
end of 21	85		3,524,684	34,103	214,684	12,984	6,301,512	0	10,037,880	47,087	0.49 %	0	43,312	0	(48,000)	0	(5,375)	36,000	36,000	0	end of 24
end of 22			3,562,345	32,833	204,804	13,230	6,616,587	0	10,383,736	46,063	0.46 %	0									end of 25
			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	1,150,978	0		

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.

Doe, Jane

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

Structured Income Planning

EditDynamic Mode

ScenarioGraphs

Planning Horizon24 years

Accounts

BA

IRA

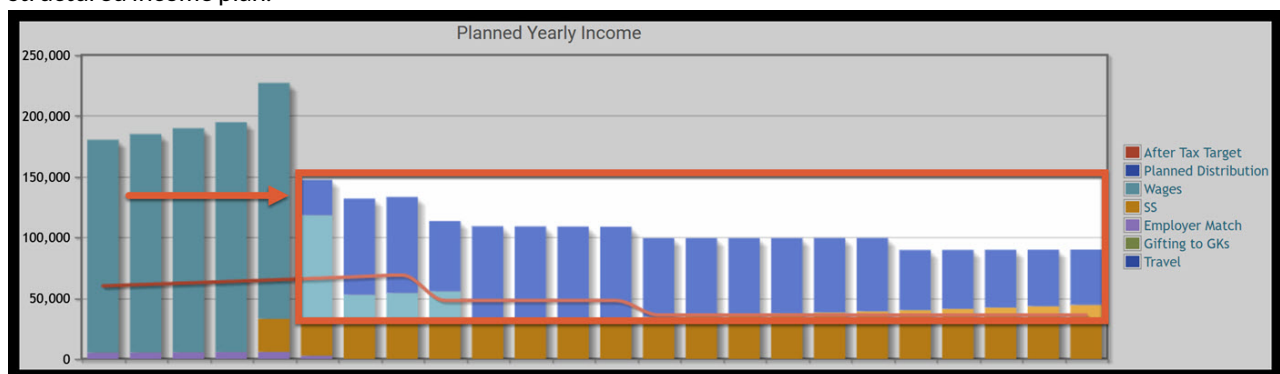
ROTH 401(k)

Incomes

Expenses

Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Wages	SS	Employer Match	Gifting to 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	125,000	2,000,000	5,125,000			5,125,000												
bonus % w/bonus		0.00 %	0.00 %	Jane inc	0.00 %			0	Subtotal of account incomes		Infl Factor	Infl Factor	Infl Factor	Infl Factor	Infl Factor			Infl Factor		from total income to target
		3,000,000	125,000	2,000,000	5,125,000			0			2.60 %	2.60 %	2.50 %	0.00 %	0.00 %			2.00 %		
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)	6,148,928	(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)	6,322,488	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	3,347,906	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	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	7,076,093	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	3,329,130	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 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	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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
		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	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.

Doe, Jane

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Structured Income Planning

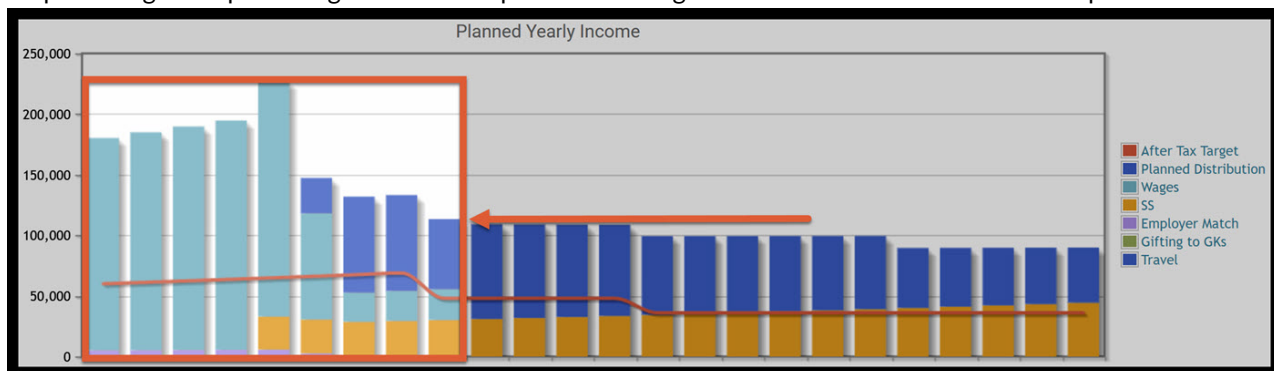
Scenario: Graphs

Planning Horizon: 24 years

Accounts: BA, IRA, ROTH 401(k)

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 %														
initial amount		3,000,000		125,000		2,000,000		5,125,000	Subtotal of account incomes											
bonus %		0.00 %		0.00 %		0.00 %		0												
w/bonus		3,000,000		125,000		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)	2,226,787	(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)	(46,995)	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)	6,322,488	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	3,347,906	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)	(9,609)	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	7,076,093	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	3,329,130	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 15
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,993	0.81 %	0	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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
			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	1,150,978	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.

Doe, Jane

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Structured Income Planning

Scenario

Graphs

Planning Horizon

24 years

BA

IRA

ROTH 401(k)

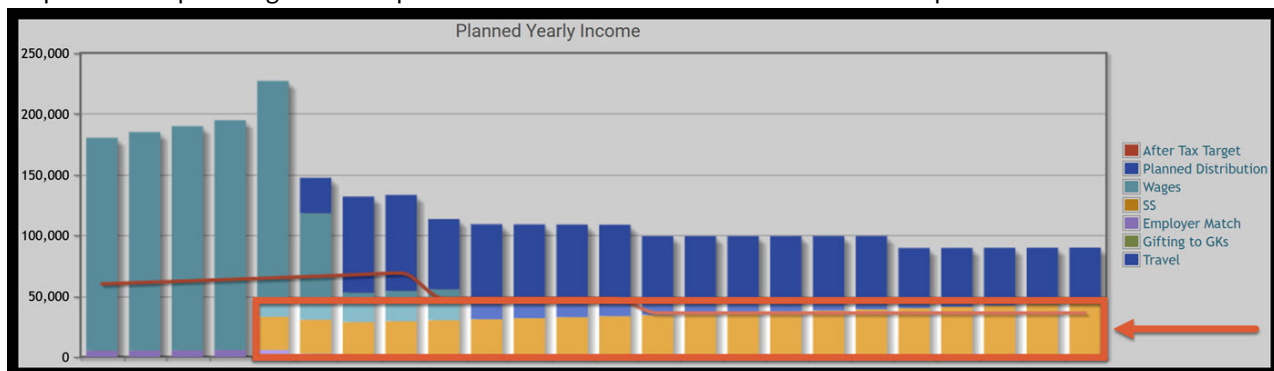
Accounts

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		125,000			2,000,000	5,125,000												
bonus %		0.00 %		0.00 %		Jane inc	0.00 %													
w/bonus		3,000,000		125,000			2,000,000	5,125,000												
											Inf Factor	Inf Factor	Inf Factor	Inf Factor	Inf Factor				Inf Factor	from total income to target
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)	(46,995)	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)	6,322,488	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	3,347,906	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)	(9,609)	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	7,076,093	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	3,329,130	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 15
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,893	0.81 %	0	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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
			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	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.

Doe, Jane

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: 09/10/2025

Structured Income Planning

Scenario: Graphs

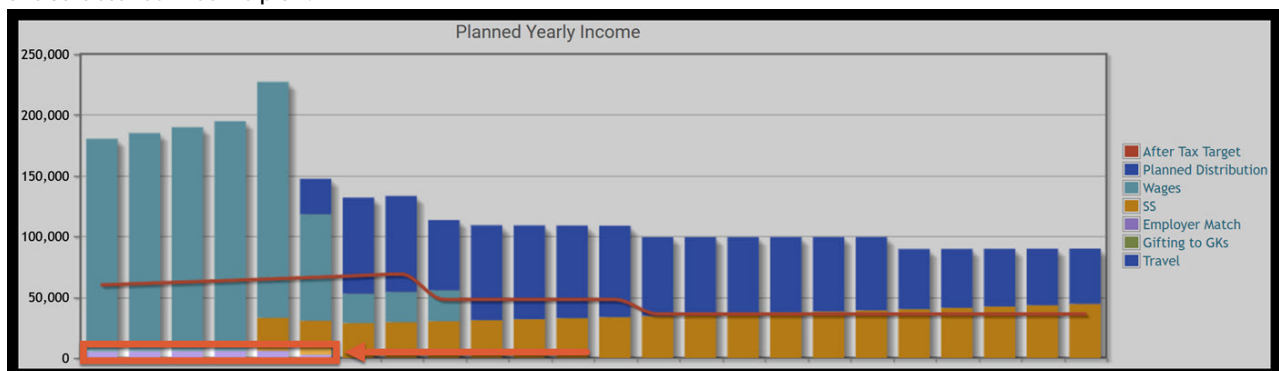
Planning Horizon: 24 years

Accounts: BA, IRA, ROTH 401(k)

Incomes: SS, 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 %		5.00 %														
initial amount		3,000,000		125,000		2,000,000		5,125,000												
bonus %		0.00 %		0.00 %		0.00 %														
w/bonus		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)	(46,995)	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)	6,322,488	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	3,347,906	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)	(9,609)	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	7,076,093	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	3,329,130	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 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	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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
			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	1,150,978	0	

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.

Doe, Jane

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Structured Income Planning

Scenario

Graphs

Planning Horizon

24 years

Accounts

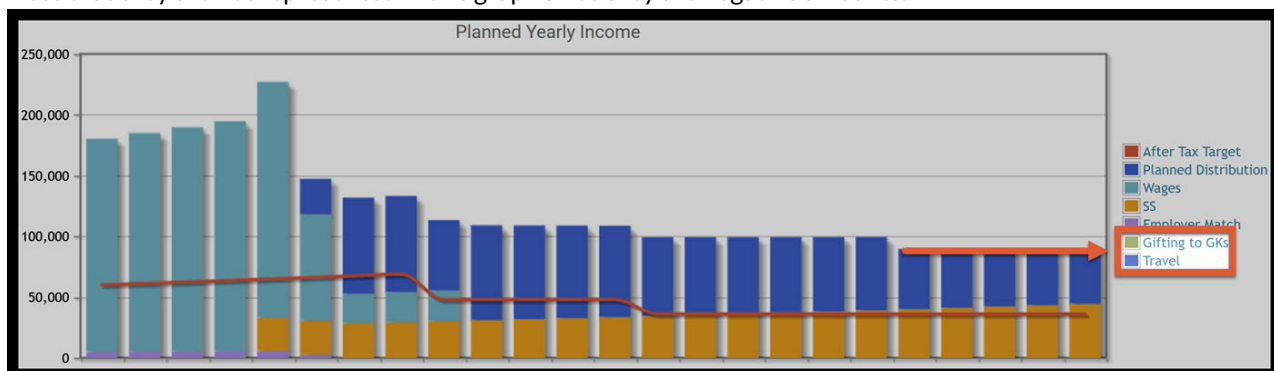
BAIRAROTH 401(k)

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 %		5,125,000	Subtotal of account incomes													
initial amount		3,000,000		125,000	Jane inc	2,000,000		5,125,000														
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0														
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)	(46,995)	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)	6,322,488	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	3,347,906	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)	(9,609)	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	7,076,093	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	3,329,130	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 15		
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,893	0.81 %	0	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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		
			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	1,150,978	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.

Doe, Jane

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: 09/10/2025

Structured Income Planning

Edit Dynamic Mode

Scenario

		Accounts						Incomes										Exp. ses									
Planning Horizon		BA		IRA		ROTH 401(k)																					
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		125,000		2,000,000	5,125,000	0	Subtotal of account incomes																	
w/bonus			0.00 %		0.00 %	Jane inc	0.00 %	5,125,000			InfFlr Factor 2.60 %	InfFlr Factor 2.60 %	InfFlr Factor 2.50 %	InfFlr Factor 0.00 %	InfFlr Factor 0.00 %												
			3,000,000		125,000		2,000,000																			from total income to target	
																										2.00 %	
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		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		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		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		5,654	(48,000)	(7,500)	(46,995)	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		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	3,347,906	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	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	7,076,093	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	3,329,130	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 15							
end of 16	77	3,342,971	52,741	247,366	10,952	4,478,368	0	8,068,704	63,893	0.81 %	0	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 %	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	37,890	229,583	12,095	5,443,484	0	9,096,542	49,985	0.57 %	0	39,086	0	(48,000)	0	(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	0.54 %	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							
			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	1,150,978	0								

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.