

# Downloading a Report for Your Clients

03/12/2026 3:25 pm EDT

A report provides a quick, customizable snapshot of your client's financial data. It is generated as a PDF, making it easy to share digitally or print. The report automatically reflects the scenario currently displayed on the Structured Income Planning page, and you can choose which pages to include using simple checkboxes. Below is the hypothetical client we will use as an example.

## Client Information:

- John Doe, age 58; birth date: 01/01/1968; retirement age: 67
- Jane Doe, age 54; birth date: 01/01/1972; retirement age: 67

## Incomes:

- John Doe – Wages: \$125,000 growing at 2.8% per year; Social Security (SS) at 67: \$32,626 COLA at 2.8%; Pension at 67: \$48,000 COLA at 2.0%
- Jane Doe – Wages: \$250,000 growing at 2.8% per year; Social Security (SS) at 67: \$36,000 COLA at 2.8%

## Assets:

- Taxable Joint Brokerage Account (BA): \$2,000,000; Moderate, 3% net growth per year
- Tax-Deferred Individual IRA (John): \$450,000; Conservative, 2% net growth per year
- Tax-Free Roth (Jane): \$750,000; Conservative, 2% net growth per year
- Residential home: \$750,000
- RV: \$175,000

## Goals and Objectives:

- Both clients would like to retire at their full retirement age (67).
- Target Income: The first year will start at \$250,000 with an inflation factor of 2.5%. When in retirement, the target income will start at \$200,000 and continue to grow at 2.5%.
- Tax-Deferred Individual IRA (John): Contribute the full amount until the age of 67 and starting in retirement years withdrawal amounts to reach the target income for the remainder of the plan.
- Tax Free Roth (Jane): Contribute the full amount until the age of 67 and starting in retirement years withdrawal amounts to reach the target income for the remainder of the plan.
- Taxable Joint Brokerage Account (BA): Contribute the yearly excess amount from the target income or withdrawing to meet the target income for the remainder of the plan.

## Expenses:

- Gifting to Children: While working \$12,000 per year, in retirement \$24,000 for the remainder of their lifespan.
- Travel: While working \$8,000 with an inflation factor of 2.8%, at 67 starts at \$16,000 with an inflation factor of 2.8% until age 80.

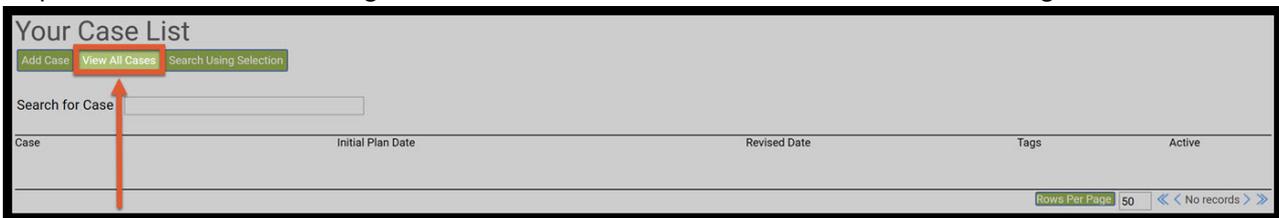
Concerns:

- Having enough money saved in retirement to cover their basic needs.
- Continue contributing to their children throughout their lifespan.
- Travel regularly until age 80.

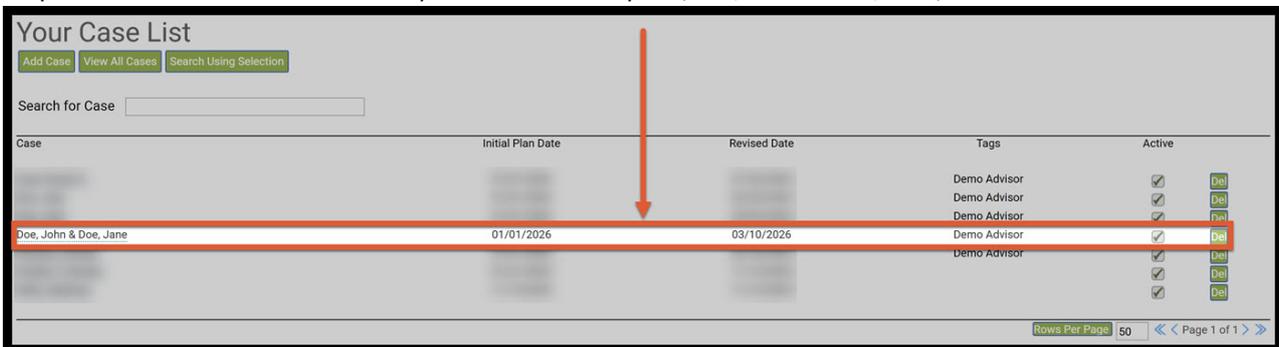
To learn more see articles:

- [Client Information](#)
- [Incomes](#)
- [Assets](#)
- [Goals and Objectives](#)
- [Downloading the Report for Your Clients](#)
- [Case Studies](#)

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



Step 2: Case: Click the client account you would like to open. (Doe, John & Doe, Jane).

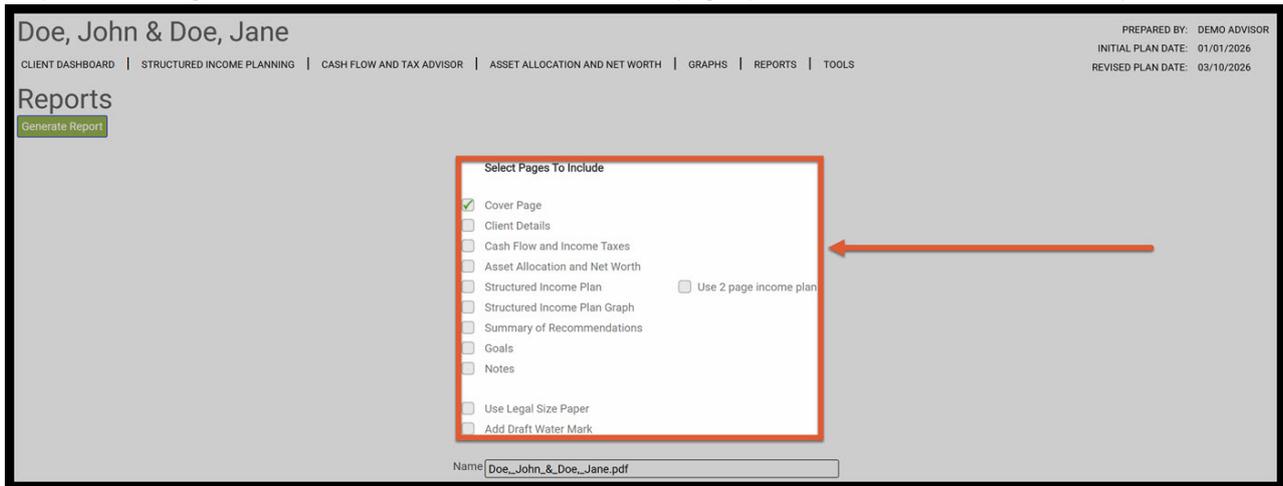


Step 3: Structured Income Planning: Click the Structured Income Planning link under the Client's name.

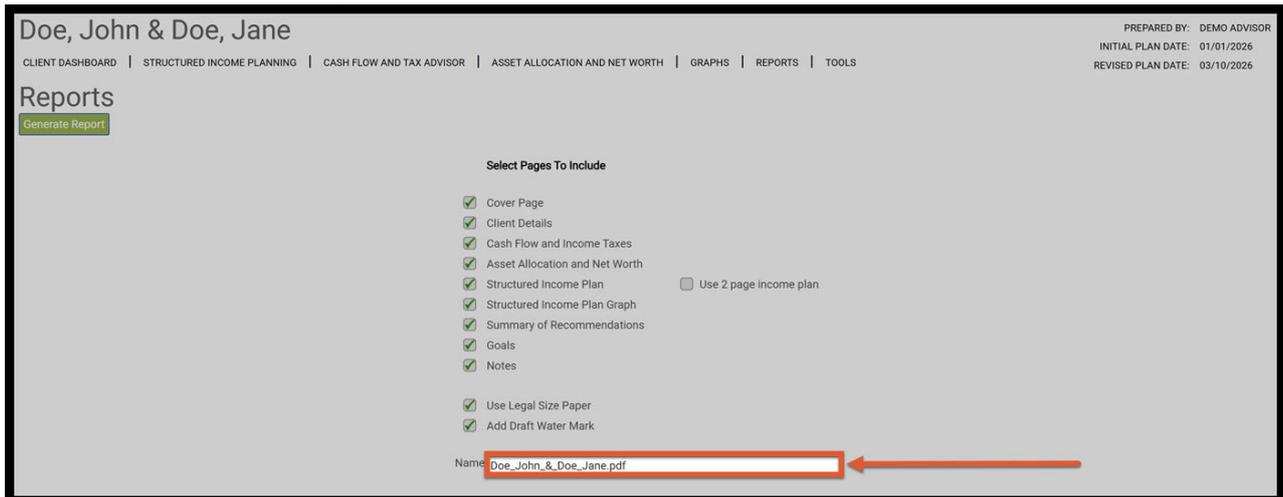




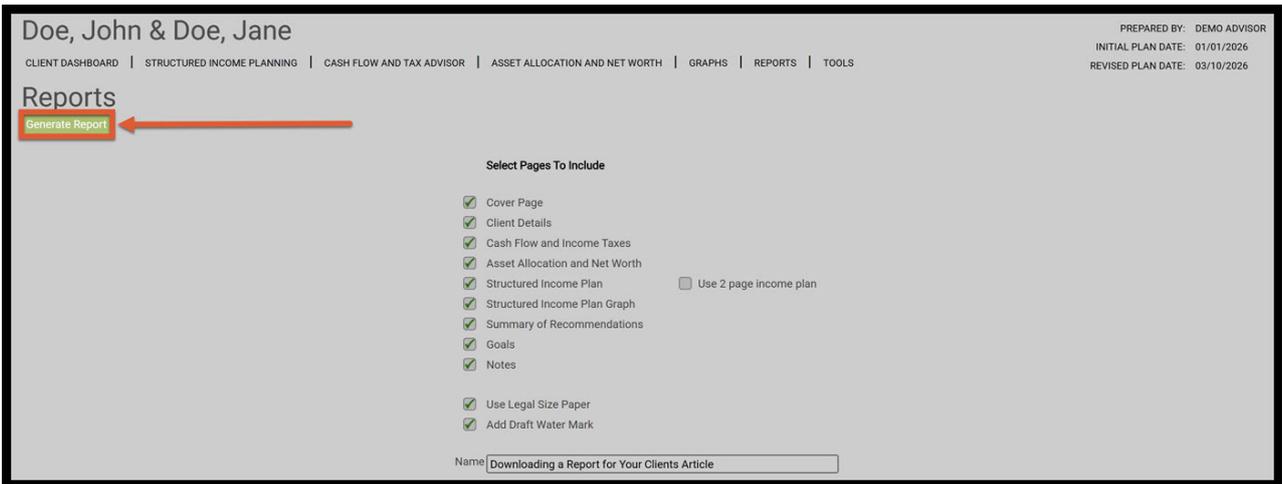
Step 7: Select Pages to Include: Click the checkboxes for the pages you would like to include in the report.



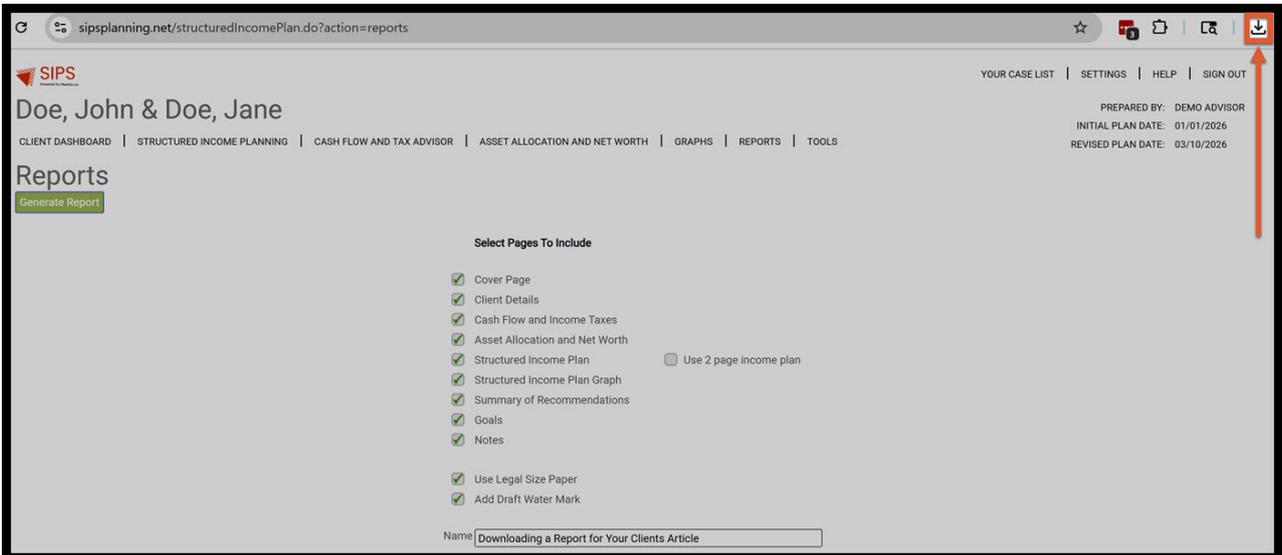
Step 8: Name: If needed, change the name of the PDF file.



Step 9: Generate Report: Click the green Generate Report button under the Reports heading.



Step 10: Download: Locate and open the PDF that was created. (or: Double-click the created PDF).



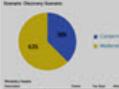
Step 11: Report: A condensed view of the report.

### Structured Income Plan

Prepared For: Doe, John & Doe, Jane  
 Prepared On: 03/16/2025  
 Prepared By: Demo Advisor

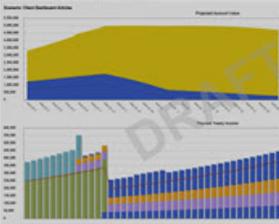


Client	Age	Income	Assets	Liabilities	Net Worth
John Doe	55	\$120,000	\$1,500,000	\$500,000	\$1,000,000
Jane Doe	52	\$100,000	\$1,000,000	\$400,000	\$600,000



Asset Class	Value	Percentage
Investments	\$1,000,000	60%
Cash	\$600,000	40%

Year	Income	Assets	Liabilities	Net Worth
2025	\$120,000	\$1,500,000	\$500,000	\$1,000,000
2026	\$120,000	\$1,500,000	\$500,000	\$1,000,000
2027	\$120,000	\$1,500,000	\$500,000	\$1,000,000



#### Summary of Recommendations

Investment Philosophy

- Investments that allow you to participate in the growth of the market while providing a steady stream of income.
- Top Quality, Life Income Payouts to provide your income.

Other Investments

- Investments that allow you to participate in the growth of the market while providing a steady stream of income.

Estate Growth and Protection

- Investments that allow you to participate in the growth of the market while providing a steady stream of income.

Structured Income Plan

- Investments that allow you to participate in the growth of the market while providing a steady stream of income.

#### Client's Goals and Objectives

Client's Primary Goal: To ensure a steady stream of income for retirement.

Client's Secondary Goal: To ensure a steady stream of income for retirement.

Client's Tertiary Goal: To ensure a steady stream of income for retirement.

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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)