

Planning Horizon Timeline

08/24/2024 3:45 pm EDT

In the structured income plan the Planning Horizon Timeline controls the timeline for the plan. The default is set for 16 years out for all clients. This timeline can be edited. Below are the step-by-step instructions to adjust the planning horizon timeline.

Step 1: The Dropdown Carrot Arrow: In the text box located next to the Planning Horizon Timeline heading click on the down carrot arrow.

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

PREPARED BY: _____
INITIAL PLAN DATE: _____
REVISED PLAN DATE: _____

Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (1)	SS (1)	Total Income	Year
net return	50	0.10 %		6.00 %						
initial amount		50,000		100,000	150,000					
bonus % w/bonus		0.00 %		0.00 %	0	Subtotal of account incomes	Infl Factor	Infl Factor		
		50,000		100,000	150,000		2.20 %	2.20 %		
end of 1	51	50,050	0	106,000	156,050	0	100,000	0	100,000	end of 1
end of 2	52	50,100	0	112,360	162,460	0	102,200	0	102,200	end of 2
end of 3	53	50,150	0	119,102	169,252	0	104,448	0	104,448	end of 3
end of 4	54	50,200	0	126,248	176,448	0	106,746	0	106,746	end of 4
end of 5	55	50,251	0	133,823	184,073	0	109,095	0	109,095	end of 5
end of 6	56	50,301	0	141,852	192,153	0	111,495	0	111,495	end of 6
end of 7	57	50,351	0	150,363	200,714	0	113,948	0	113,948	end of 7
end of 8	58	50,401	0	159,385	209,786	0	116,454	0	116,454	end of 8
end of 9	59	50,452	0	168,948	219,400	0	119,016	0	119,016	end of 9
end of 10	60	50,502	0	179,085	229,587	0	121,635	0	121,635	end of 10
end of 11	61	50,553	0	189,830	240,383	0	124,311	0	124,311	end of 11
end of 12	62	50,603	0	201,220	251,823	0	127,046	0	127,046	end of 12
end of 13	63	50,654	0	213,293	263,947	0	129,841	0	129,841	end of 13
end of 14	64	50,705	0	226,090	276,795	0	132,697	0	132,697	end of 14
end of 15	65	50,755	0	239,656	290,411	0	135,616	0	135,616	end of 15
end of 16	66	50,806	0	254,035	304,841	0	138,600	0	138,600	end of 16
			0		0		1,893,148	0	1,893,148	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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Step 2: Year selection: Select which timeline you would like to use. The timeline range starts at 16 years and the selections are by four-year increments. The shortest time frame is 16 years, the longest timeframe is 40 years. After selecting the year, the structured income plan will automatically be saved at this timeline so the next time you log in, it will already be saved at the last timeline you have chosen.

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.