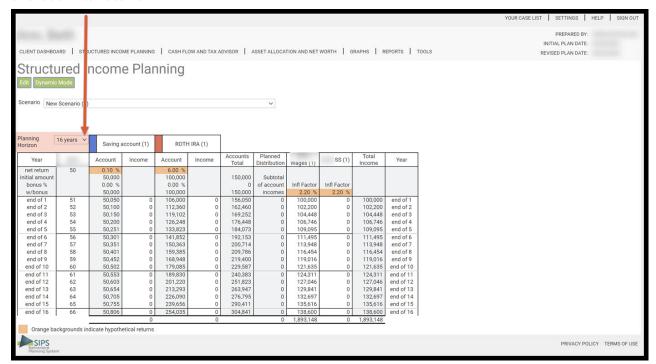
Planning Horizon Timeline

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.



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.