

How to Model ROTH Conversions in SIPS

01/03/2026 10:09 am EST

In this video we will demonstrate how the Advanced Tax Calculation features in SIPS can help you analyze and model Roth IRA conversion scenarios within a financial plan. Roth IRA conversions can significantly reduce RMDs and income tax liabilities during retirement by front-loading some taxes early.

Video Highlights:

- Initial analysis showing potential benefits of Roth conversions.
- Step-by-step execution of a Roth IRA conversion.
- Comparison of financial outcomes with and without Roth conversions.

Results:

- Accounts Total: Increased by \$240,429 with Roth conversion.
- Total Tax: Reduced by \$204,014 with Roth conversion.

By the end of this video, you'll see how Advanced Tax Planning can identify the best candidates for Roth conversions and quantify the benefits for clients. For more planning resources and tutorial videos, visit www.sipsplanning.com. For more information about our outsourced financial planning services, visit www.planscout.com. 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.
