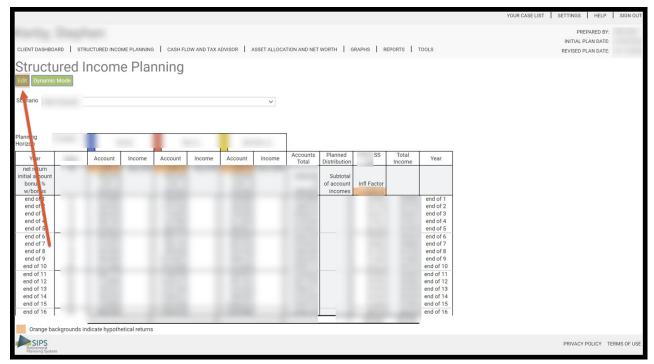
Calculated Plan Withdrawals; Makeup total beneficial RMD from one account

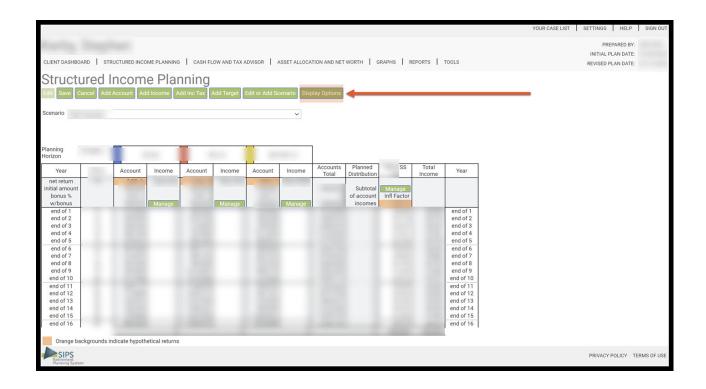
10/01/2024 10:09 am EDT

On the structured income planning page, you have the ability to view the beneficial RMD amounts and withdrawal the amounts needed for the beneficial RMD. Under the Manage Accounts page you have the option to choose the total beneficial RMD withdrawals from one account. Below is a step-by-step guide for the Make-up total owners RMD from one account function.

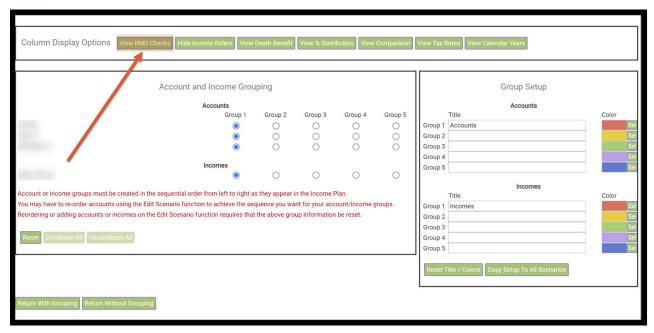
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



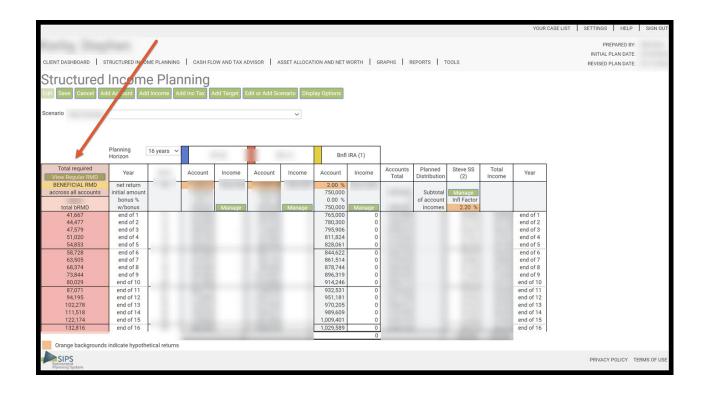
Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.



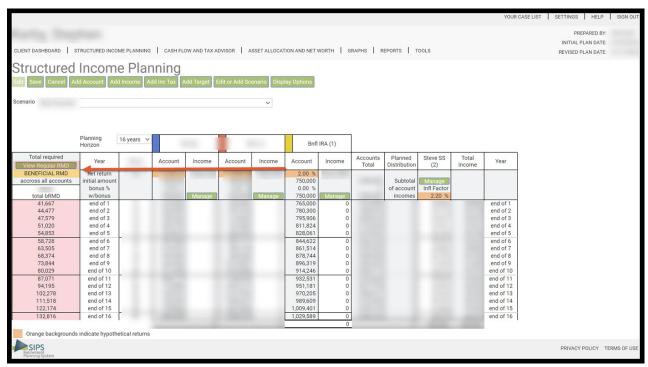
Step 3: View RMD Checks: Click on the green View RMD Checks button in the Column Display Options Table.



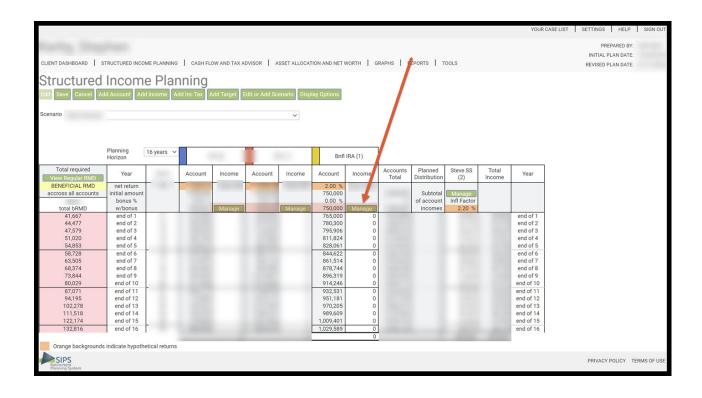
Step 4: Structured Income Planning Page: A new column on the left will appear that will display the monetary amounts for the RMD.



Step 5: View Regular RMD Option: Click on the green View Regular RMD to change the view to Beneficial RMD.

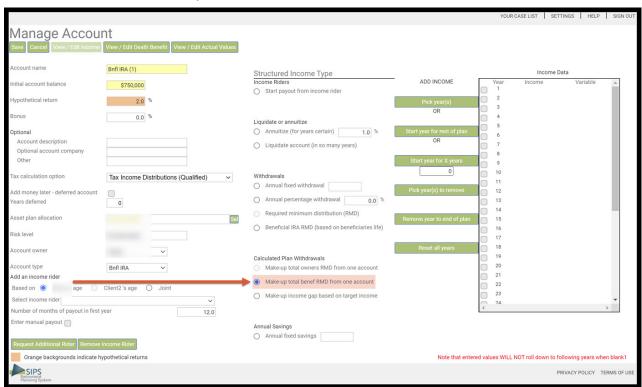


Step 6: Manage: Click on the green Manage button that is located in the incomes column for whichever account you would like to do the total beneficial RMD withdrawal from.

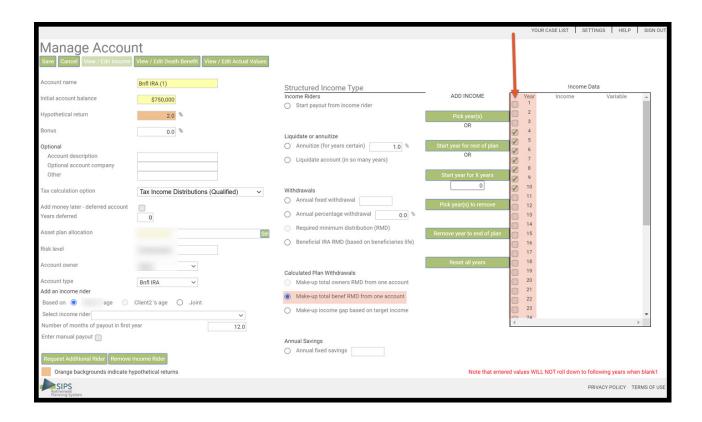


Option 1: Pick Years:

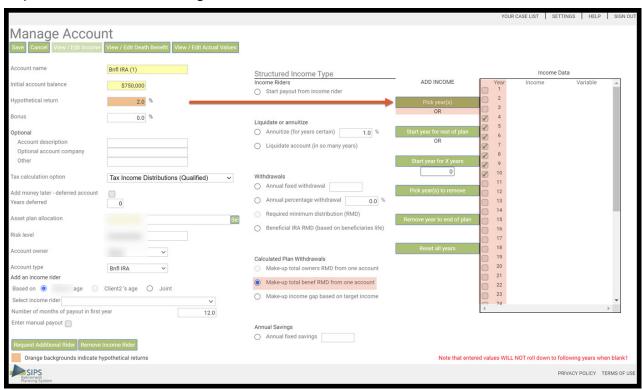
Step 7: Withdrawals: Under the Structured Income Type Calculate Plan Withdrawals section, click on the radio button next to the Make-up total benef RMD from one account.



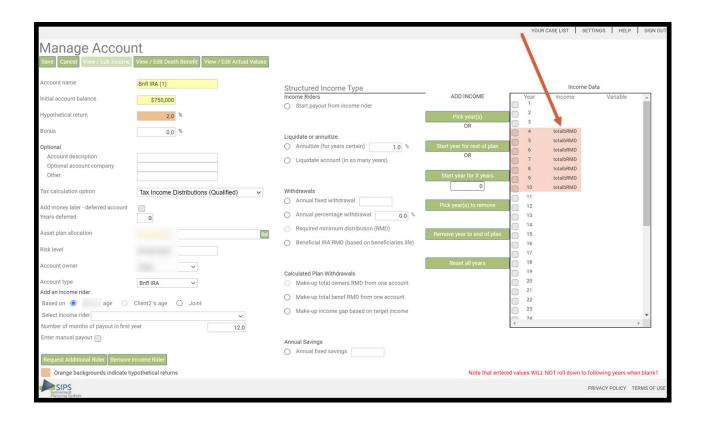
Step 8: Income Data: In the Income Data box click on the numerical year(s) that you would like the monetary addition to be added to.



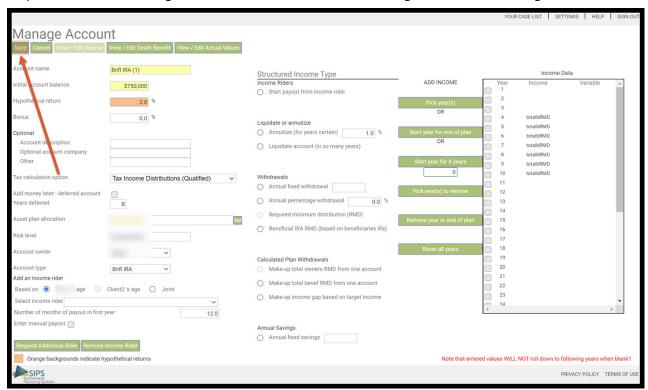
Step 9: Add Income: Click on the green Pick Years button.



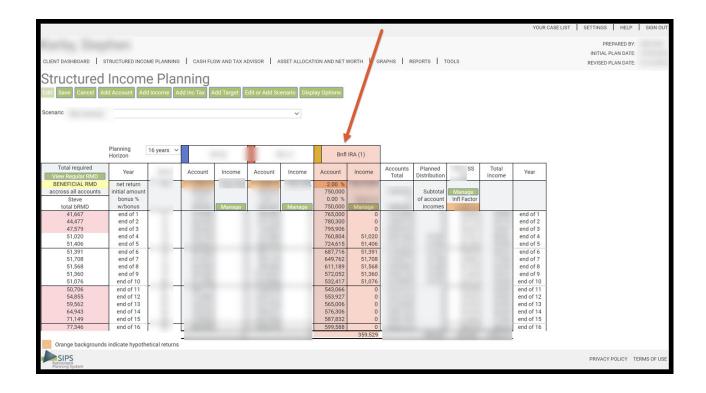
Step 10: Clicking: The phrase totalbRMD should move into the Income Column of the Income Data Table.



Step 11: Save: Click on the green Save button underneath the Manage Account subheading.

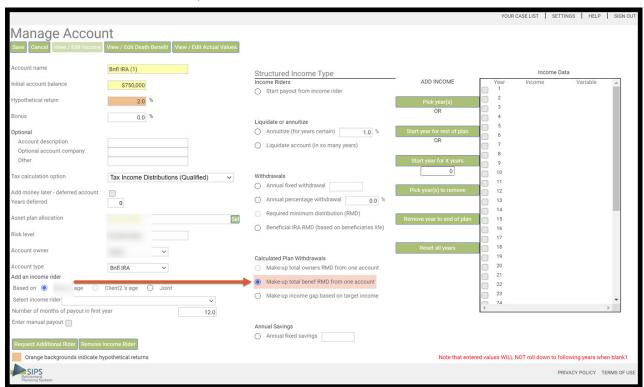


Step 12: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made into the plan.



Option 2: Start Years for the Rest of the Plan:

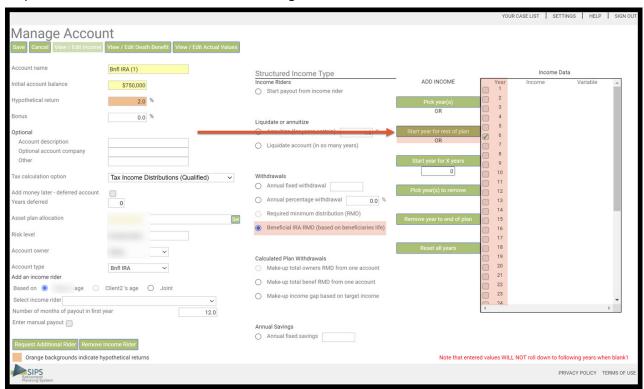
Step 13: Withdrawals: Under the Structured Income Type Calculate Plan Withdrawals section, click on the radio button next to the Make-up total benef RMD from one account.



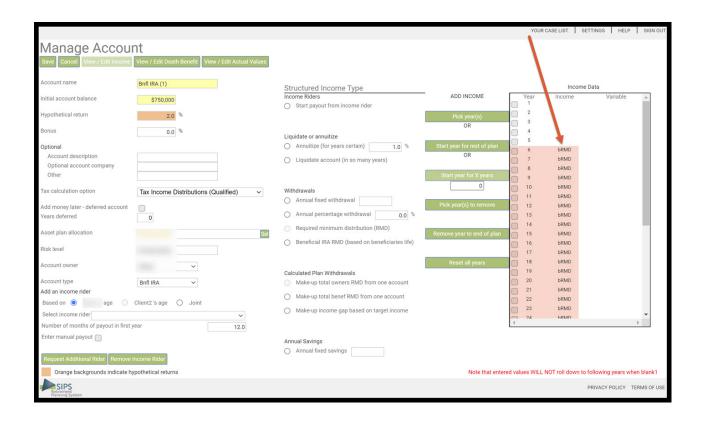
Step 14: Year: In the Income data table select which year you would like to start the years for the rest of the plan.

					YOUR CASE LIST	SETTINGS HELF	SIGN OUT
Manage Account							
	View / Edit Death Benefit View / Edit Actual Values			1			
Comments of the Comments of th				1			
Account name	Bnfl IRA (1)	Structured Income Type		+	Inco	me Data	
Initial account balance	\$750,000	Income Riders	ADD INCOME	Ye		Variable	_
Hypothetical return	2.0 %	Start payout from income rider	Pick year(s)				-
Bonus	0.0 %		OR				-
Optional		Liquidate or annuitize Annuitize (for years certain) 1.0 %	Start year for rest of plan	0	5		
Account description			OR	S	7		
Optional account company		Liquidate account (in so many years)	87		3		
Other			Start year for X years				
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		0		
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	0 1	2		
Years deferred	0	O Annual percentage withdrawal 0.0 %			3		
		Required minimum distribution (RMD)		1	4		
Asset plan allocation	Sel		Remove year to end of plan		5		
Risk level		 Beneficial IRA RMD (based on beneficiaries life) 		1	7		
Account owner			Reset all years	1			
		Calculated Plan Withdrawals		1			
Account type	Bnfl IRA ~	Make-up total owners RMD from one account		2	0		
Add an income rider	0 110	Make-up total benef RMD from one account		000	2		
Based on age Client2's age Joint		Make-up income gap based on target income		2			955.
Select income rider				2	4		· ·
Number of months of payout in first ye	12.0		ı				
Enter manual payout		Annual Savings					
Request Additional Rider Remove Income Rider		Annual fixed savings					
Orange backgrounds indicate hypothetical returns Note that entered values WILL NOT roll down to following years when blan						rhen blank1	
PRIVACY POLICY TERMS OF U							
Retirement Planning System							

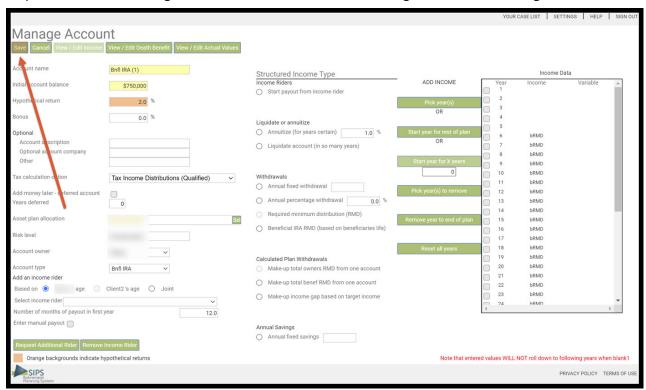
Step 15: Start Year for Rest of Plan: Click on the green button Start Year for Rest of Plan.



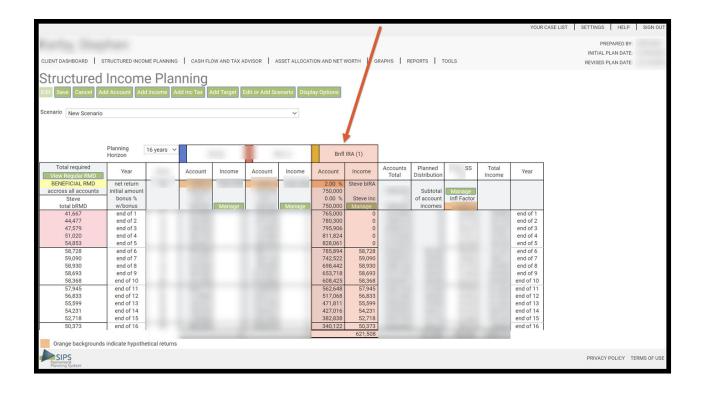
Step 16: Clicking: The phrase totalbRMD should move into the Income Column of the Income Data Table.



Step 17: Save: Click on the green Save button underneath the Manage Account subheading.

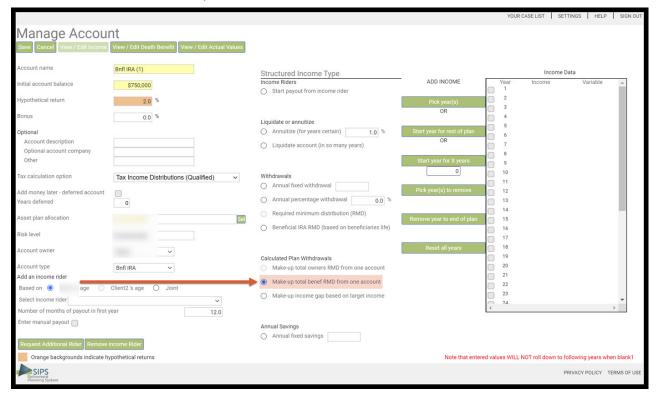


Step 18: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made into the plan.

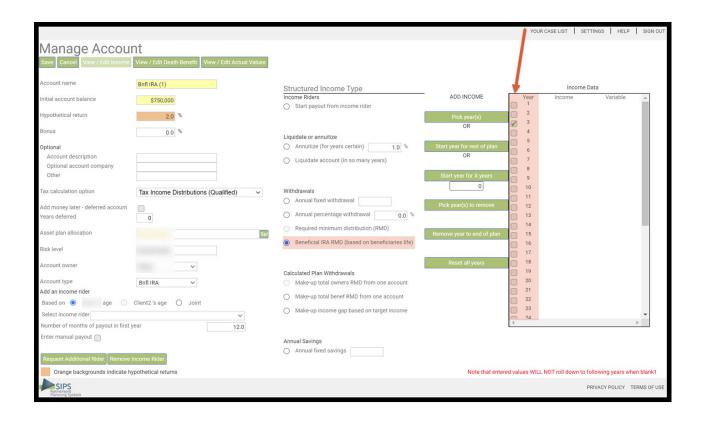


Option 3: Start Years for X Years:

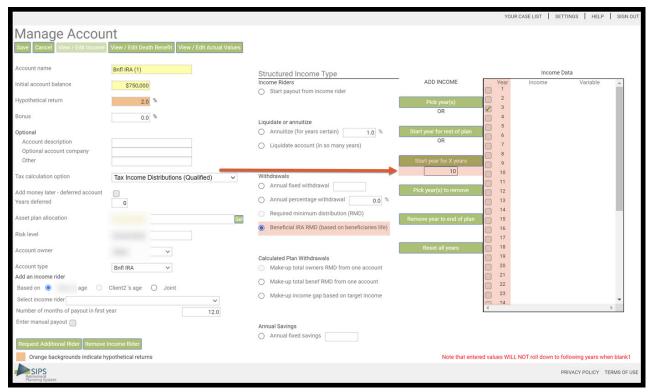
Step 19: Withdrawals: Under the Structured Income Type Calculate Plan Withdrawals section, click on the radio button next to the Make-up total benef RMD from one account.



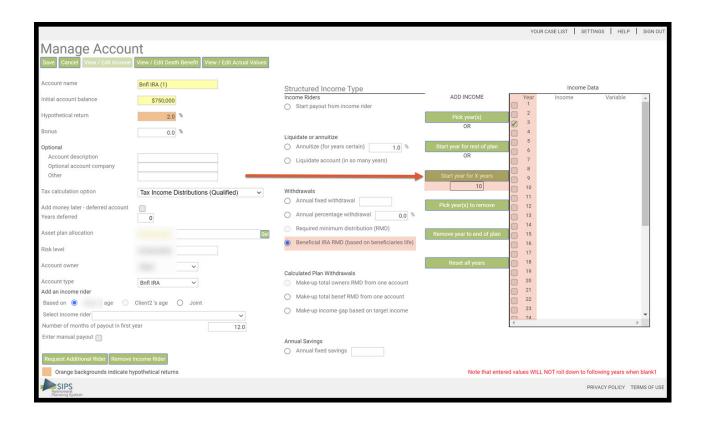
Step 20: Year: In the Income data table select which year you would like to start the monetary addition.



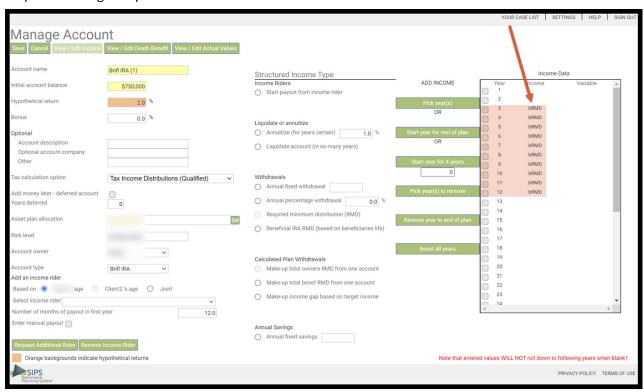
Step 21: Start Year for X Years Text Box: Within the text box for Start Year fox X Years, type in the how many years you would like the monetary amount to be distributed.



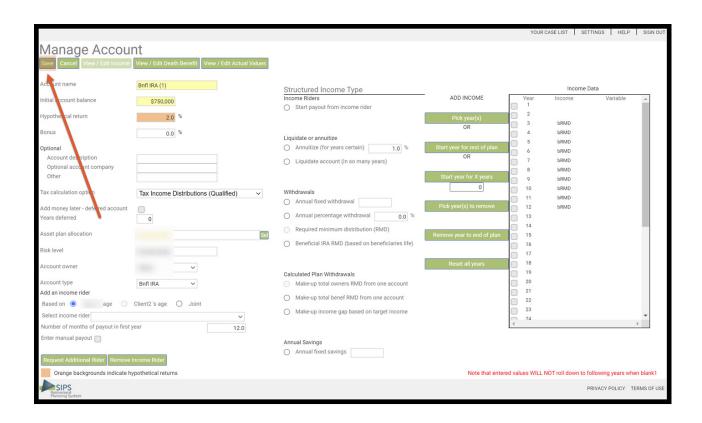
Step 22: Start Years for X Years: Click on the green button Start Years for X Years.



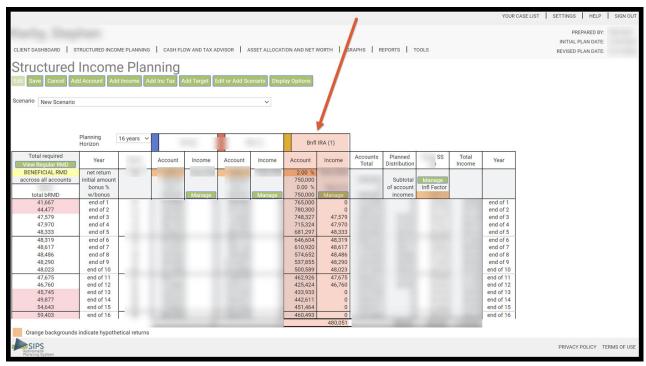
Step 23: Clicking: The phrase totalbRMD should move into the Income Column of the Income Data Table.



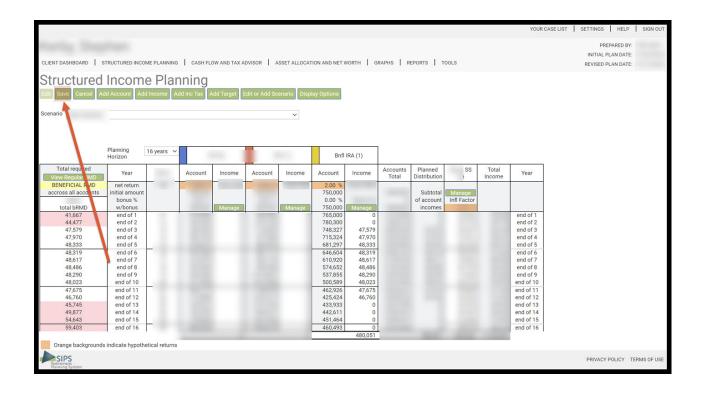
Step 24: Save: Once done click on the green Save button underneath the Manage Account subheading.



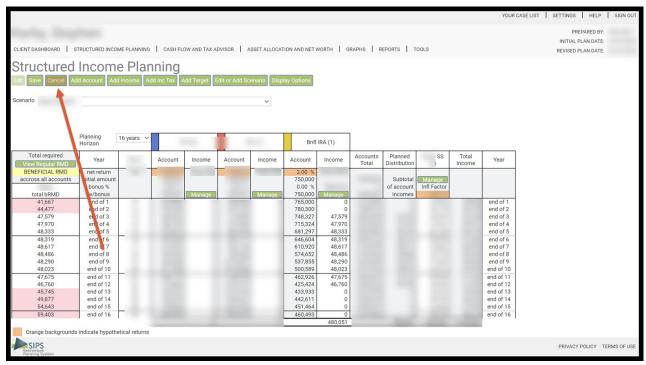
Step 25: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made into the plan.



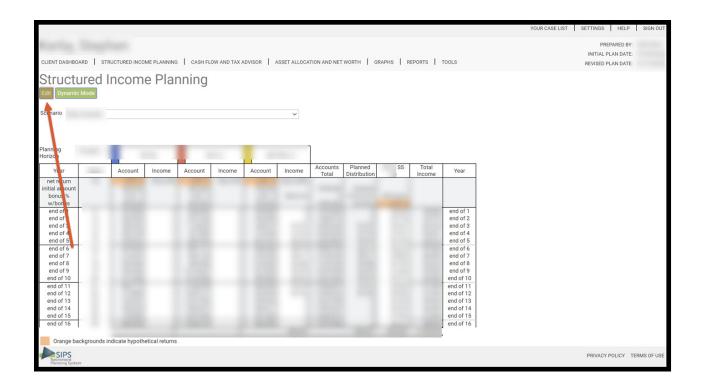
Step 26: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



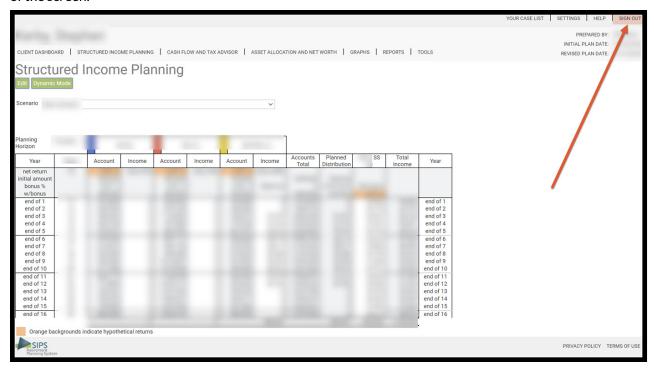
Step 27: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 28: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



Step 29: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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.