

Viewing Calendar Years instead of Plan Years

09/17/2024 1:50 pm EDT

Within the Display Options within the structured income planning page, you can edit the structured income plan to show the calendar years instead of the plan years. Below is a step-by-step guide for viewing the calendar years.

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

The screenshot displays the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this is a breadcrumb trail: 'CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS'. The main heading is 'Structured Income Planning', with two buttons: 'Edit' (highlighted with a red arrow) and 'Dynamic Mode'. Below the heading is a 'Scenario' dropdown menu set to 'New Scenario'. A 'Planning Horizon' dropdown is set to '20 years'. The main data table has columns: 'Year', 'Account', 'Income', 'Account', 'Income', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'SS', 'Total Income', and 'Year'. The rows include 'net return', 'initial amount', 'bond % w/bonus', and 'end of' years from 1 to 20. A legend at the bottom left states 'Orange backgrounds indicate hypothetical returns'. The SIPS logo and 'Retirement Planning System' are in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' are in the bottom right.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
end of 1											end of 1
end of 2											end of 2
end of 3											end of 3
end of 4											end of 4
end of 5											end of 5
end of 6											end of 6
end of 7											end of 7
end of 8											end of 8
end of 9											end of 9
end of 10											end of 10
end of 11											end of 11
end of 12											end of 12
end of 13											end of 13
end of 14											end of 14
end of 15											end of 15
end of 16											end of 16
end of 17											end of 17
end of 18											end of 18
end of 19											end of 19
end of 20											end of 20

Orange backgrounds indicate hypothetical returns

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Step 3: View Calendar Years: Click on the green View Calendar Years button in the Column Display Options Table.

Column Display Options [View RMD Checks](#) [Hide Income Riders](#) [View Death Benefit](#) [View % Distribution](#) [View Comparison](#) [View Tax Rates](#) [View Calendar Years](#)

Account and Income Grouping

Accounts

	Group 1	Group 2	Group 3	Group 4	Group 5
401k (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beneficial IRA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

	Group 1	Group 2	Group 3	Group 4	Group 5
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Account or income groups must be created in the sequential order from left to right as they appear in the Income Plan.
You may have to re-order accounts using the Edit Scenario function to achieve the sequence you want for your account/income groups.
Reordering or adding accounts or incomes on the Edit Scenario function requires that the above group information be reset.

[Reset](#) [Condense All](#) [Uncondense All](#)

Group Setup

Accounts

Group	Title	Color	Set
Group 1	Accounts		Set
Group 2			Set
Group 3			Set
Group 4			Set
Group 5			Set

Incomes

Group	Title	Color	Set
Group 1	Incomes		Set
Group 2			Set
Group 3			Set
Group 4			Set
Group 5			Set

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 4: Structured Income Planning Page: The Year columns will change to the calendar years.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Structured Income Planning

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[Save](#)
[Cancel](#)
[Add Account](#)
[Add Income](#)
[Add Inc Tax](#)
[Add Target](#)
[Edit or Add Scenario](#)
[Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
2024											2024
2025											2025
2026											2026
2027											2027
2028											2028
2029											2029
2030											2030
2031											2031
2032											2032
2033											2033
2034											2034
2035											2035
2036											2036
2037											2037
2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

Orange backgrounds indicate hypothetical returns

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Step 5: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

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Structured Income Planning

[Edit](#)
[Save](#)
[Cancel](#)
[Add Account](#)
[Add Income](#)
[Add Inc Tax](#)
[Add Target](#)
[Edit or Add Scenario](#)
[Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
2024											2024
2025											2025
2026											2026
2027											2027
2028											2028
2029											2029
2030											2030
2031											2031
2032											2032
2033											2033
2034											2034
2035											2035
2036											2036
2037											2037
2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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Step 6: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Structured Income Planning

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

Scenario:

Planning Horizon: 20 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
2024											2024
2025											2025
2026											2026
2027											2027
2028											2028
2029											2029
2030											2030
2031											2031
2032											2032
2033											2033
2034											2034
2035											2035
2036											2036
2037											2037
2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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Step 7: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

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Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon: 20 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
2024											2024
2025											2025
2026											2026
2027											2027
2028											2028
2029											2029
2030											2030
2031											2031
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2036											2036
2037											2037
2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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Step 8: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

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Structured Income Planning

[Edit](#) | [Save](#) | [Cancel](#) | [Add Account](#) | [Add Income](#) | [Add Inc Tax](#) | [Add Target](#) | [Edit or Add Scenario](#) | [Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year
net return											
initial amount											
bonus % w/bonus											
2024											2024
2025											2025
2026											2026
2027											2027
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2029											2029
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2031											2031
2032											2032
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2037											2037
2038											2038
2039											2039
2040											2040
2041											2041
2042											2042
2043											2043

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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: +1-888-449-6917 or support@planscout.com.