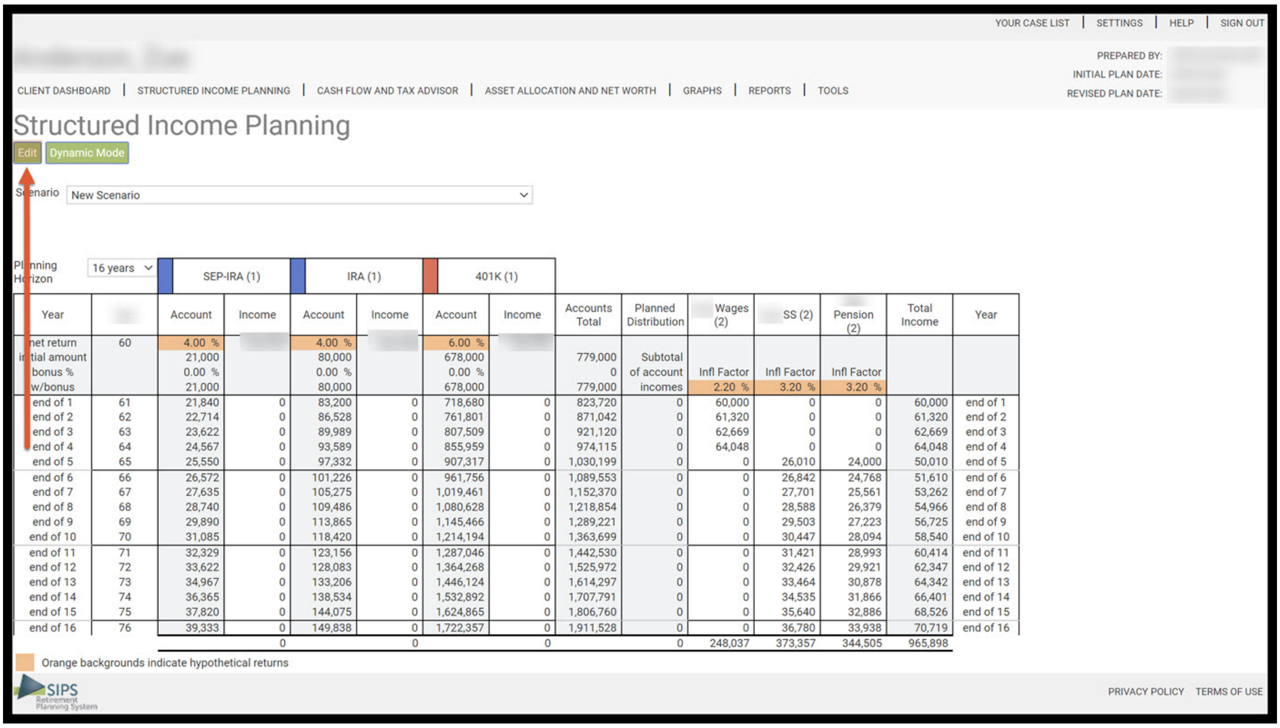
Account and Income Groups and Group Setup

09/17/2024 1:47 pm EDT

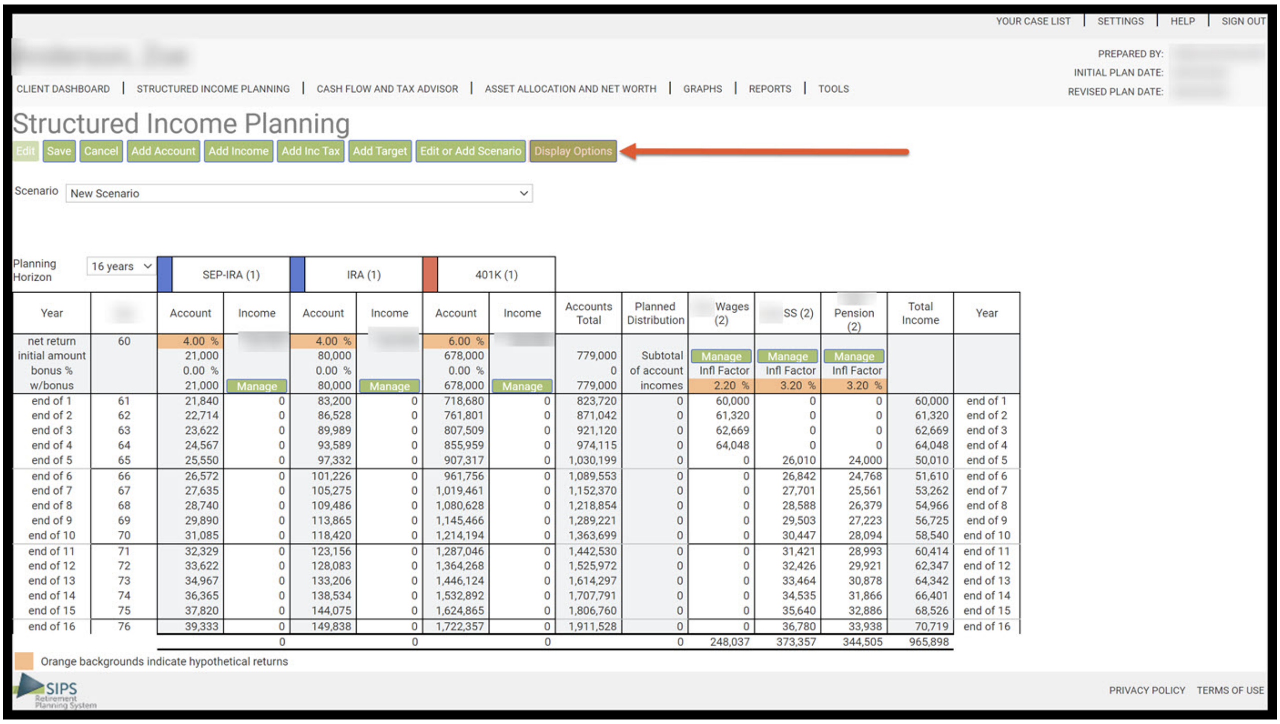
Within the Display Options within the structured income planning page, you can edit account and incomes into different groups. Below is a step-by-step guide for editing the account and incomes groups.

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



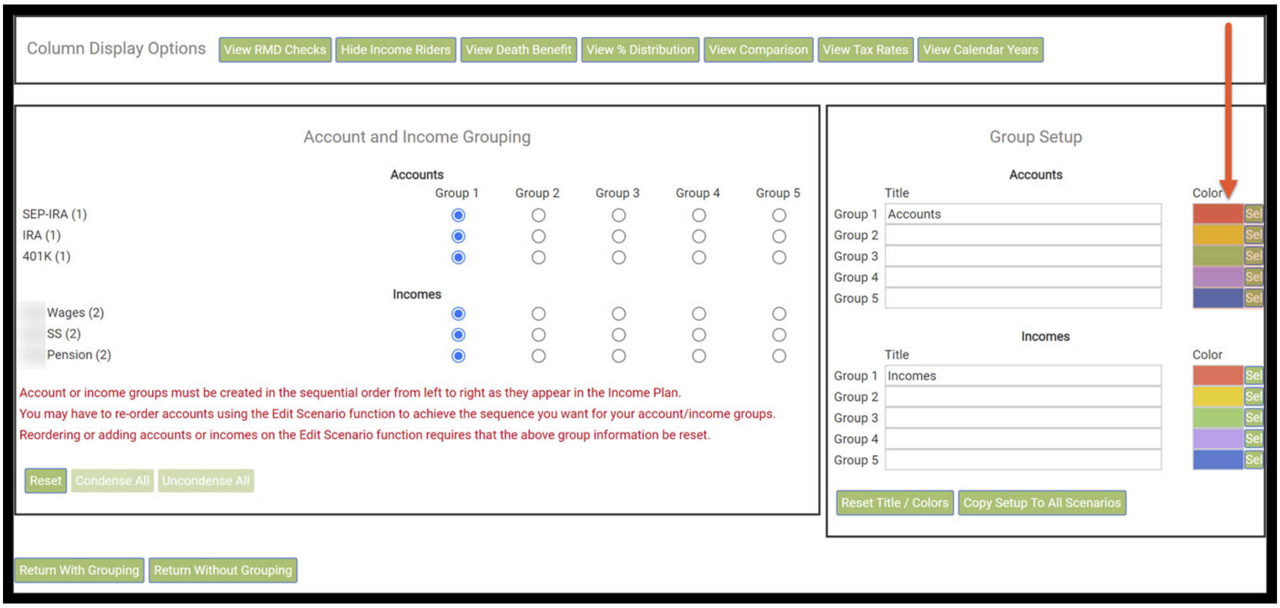
		SEP-IRA (1)		IRA (1)		401K (1)								
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return	60	4.00 %		4.00 %		6.00 %								
initial amount		21,000		80,000		678,000		779,000	Subtotal					
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor		
w/bonus		21,000		80,000		678,000		779,000	incomes	2.20 %	3.20 %	3.20 %		
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669	end of 3
end of 4	64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	50,010	end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	51,610	end of 6
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	25,561	53,262	end of 7
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	26,379	54,966	end of 8
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	27,223	56,725	end of 9
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	28,094	58,540	end of 10
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	28,993	60,414	end of 11
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	29,921	62,347	end of 12
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	30,878	64,342	end of 13
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	31,866	66,401	end of 14
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	32,886	68,526	end of 15
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	33,938	70,719	end of 16
			0		0		0		0	248,037	373,357	344,505	965,898	

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

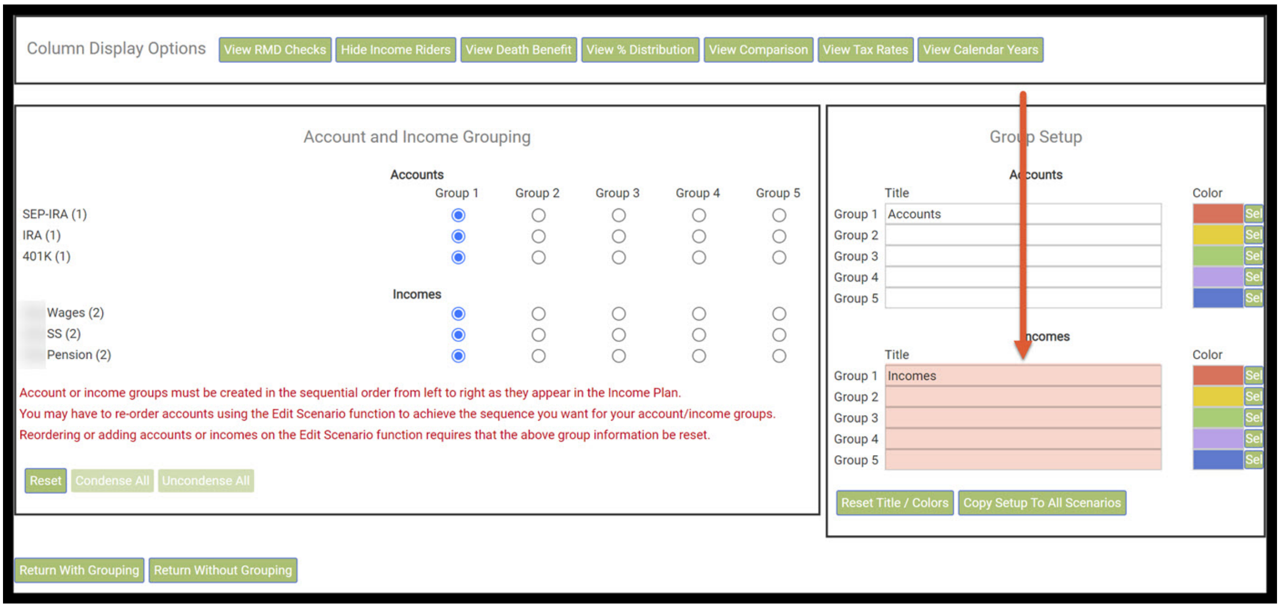


Step 3: Group Setup Accounts: Under the Title section delete default name and type in whichever titles you would like to use.

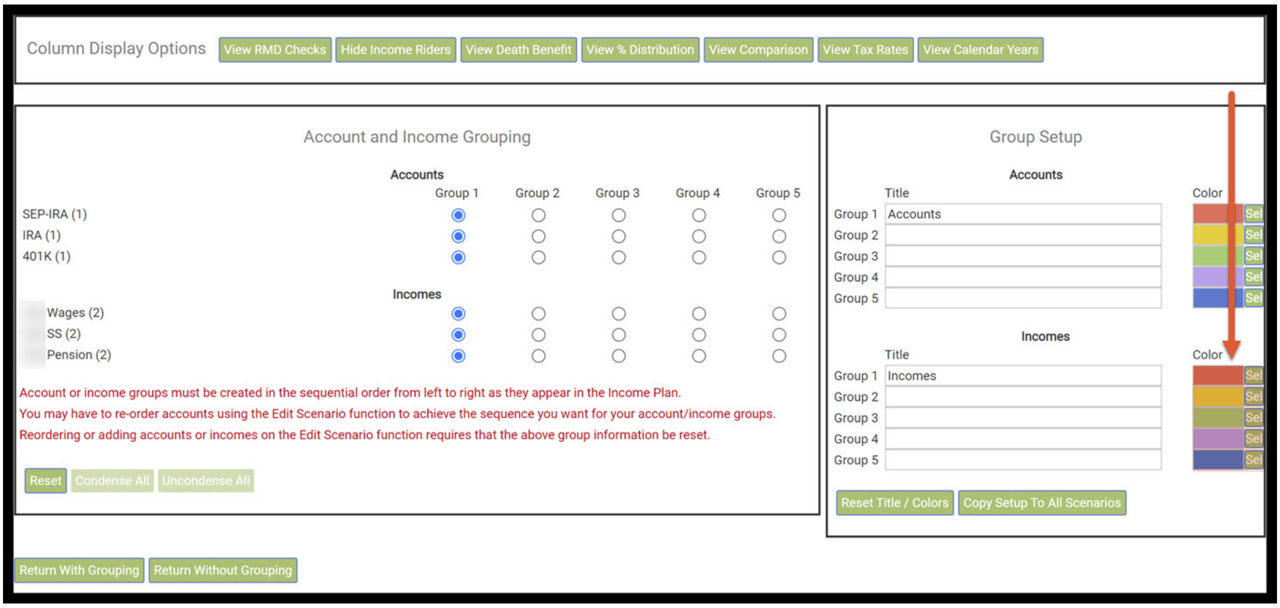
Step 4: Color Selection Accounts: Click on the green Sel button next to the color of the title to select which color you would like the group title to be.



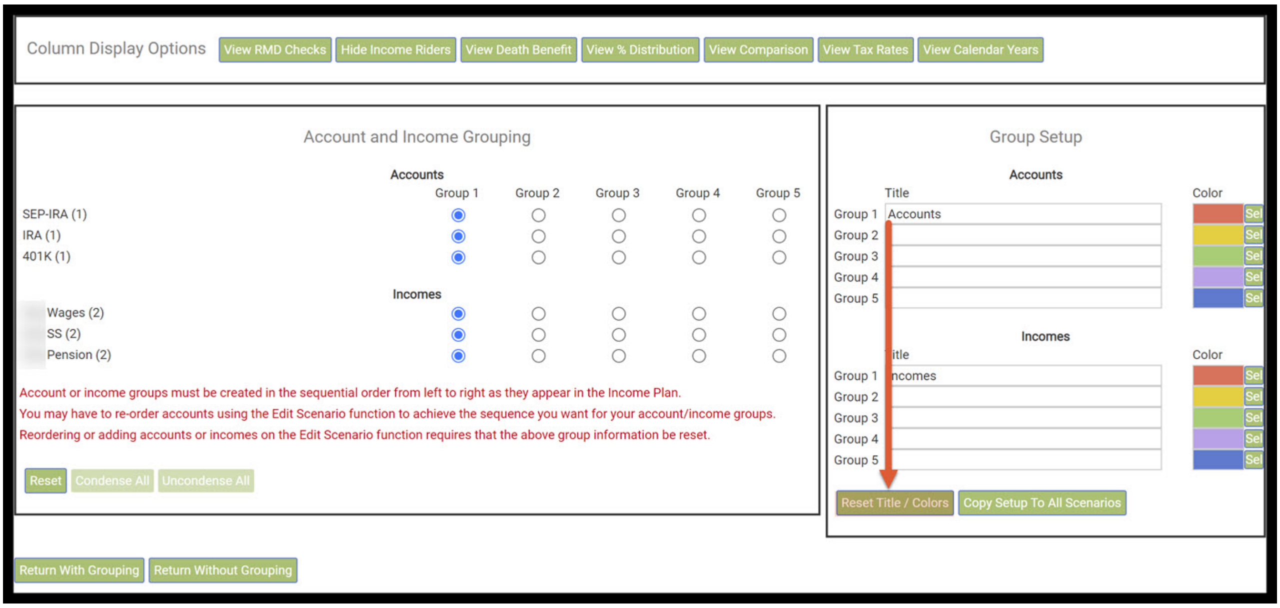
Step 5: Group Setup Incomes: Under the Title section delete default name and type in whichever title you would like to use.



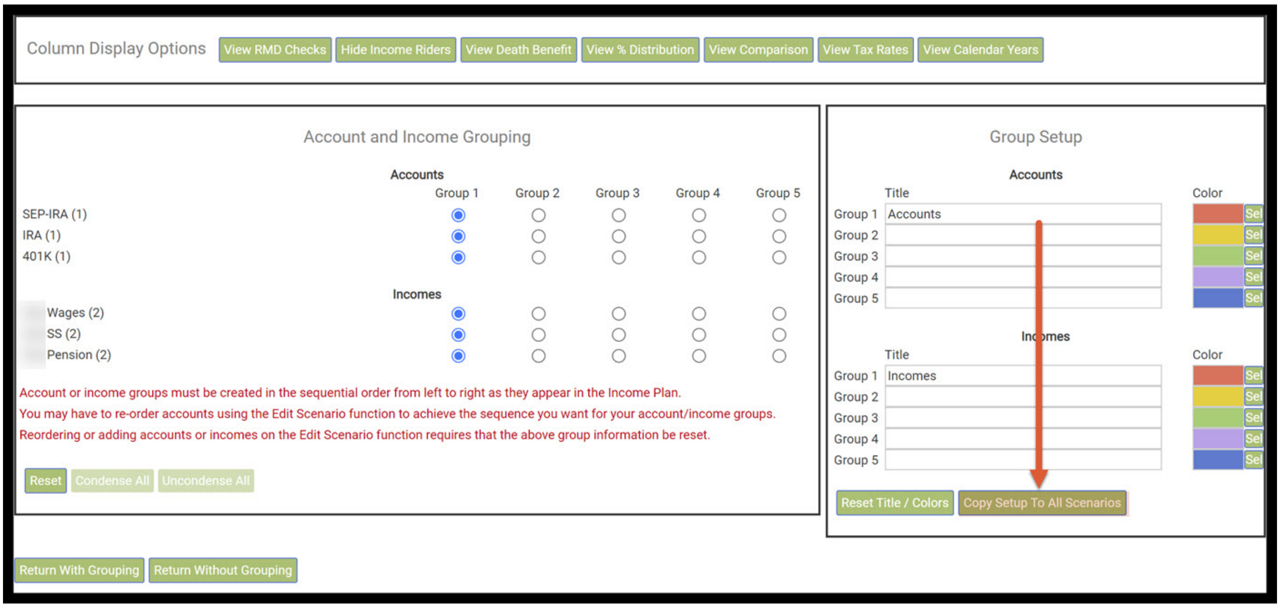
Step 6: Color Selection Incomes: Click on the green Sel button next to the color of the title to select which color you would like the group title to be.



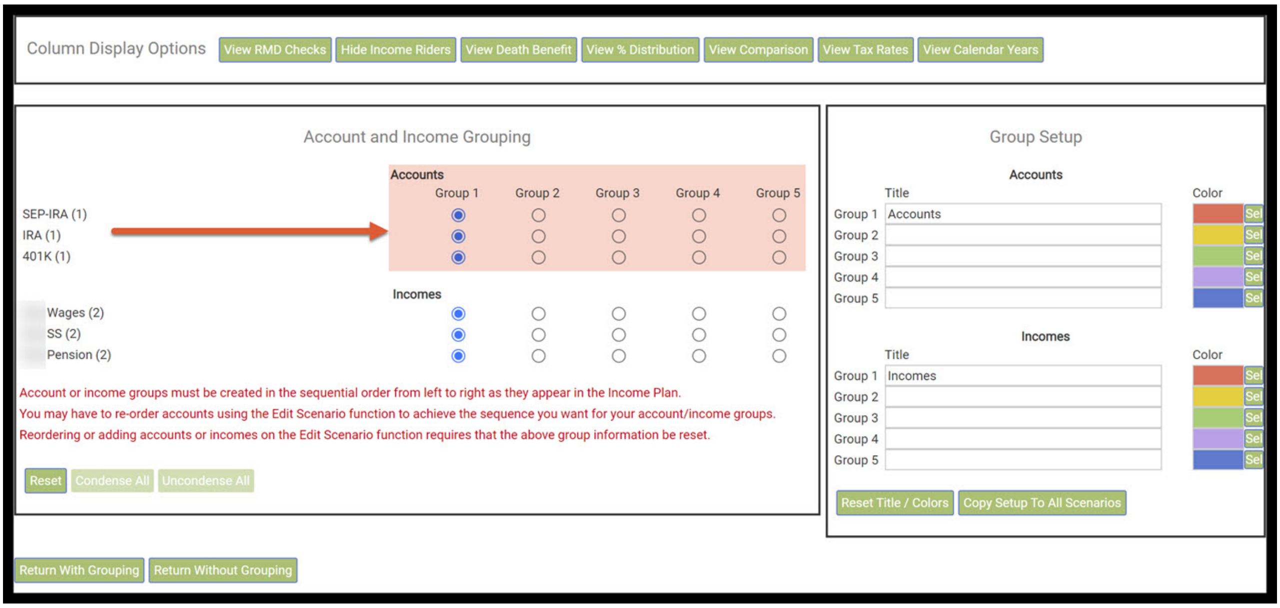
Step 7: Reset Title/Colors: To reset the titles and colors click on the green Reset Title/Colors box located in the lower lefthand side of the table.



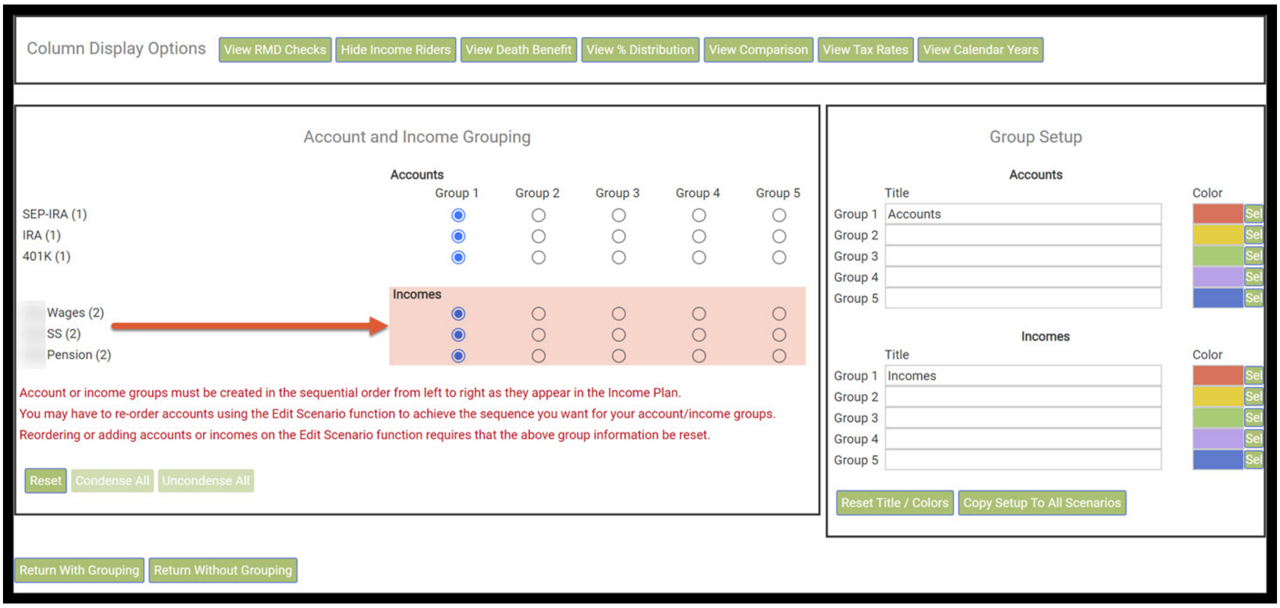
Step 8: Copy Setup to All Scenarios: To replicate the group setup to all scenarios, click on the green Copy Setup to All Scenarios button located on the righthand side of the table.



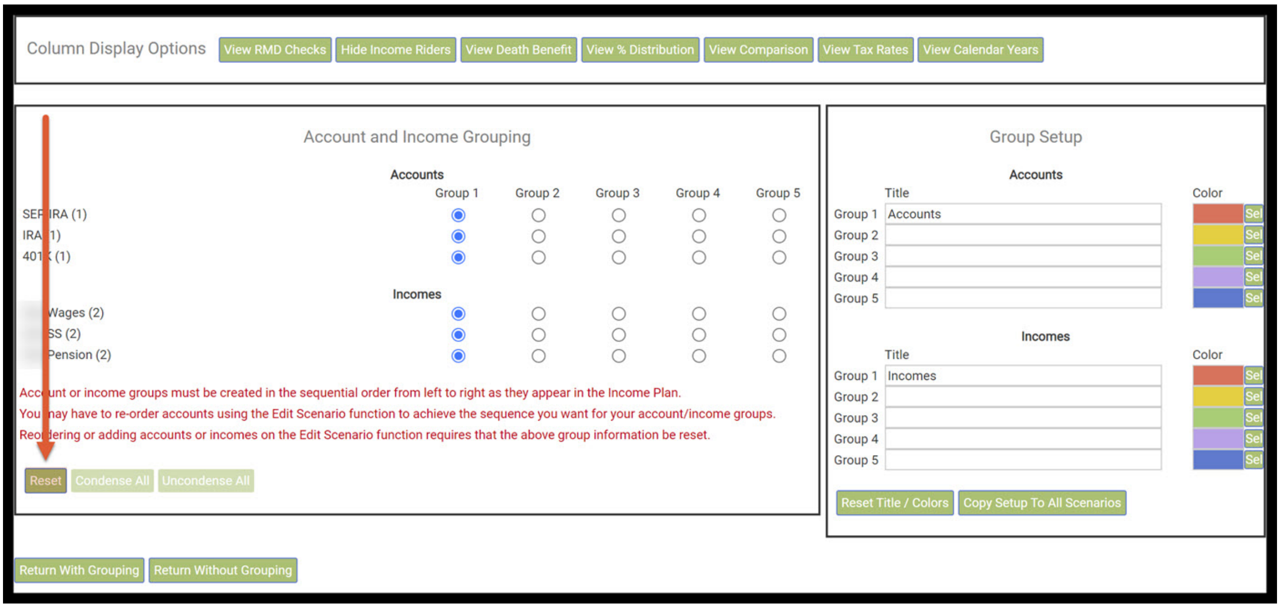
Step 9: Account and Income Grouping Accounts: Click on the radio buttion for which group you would like the accounts to be under.



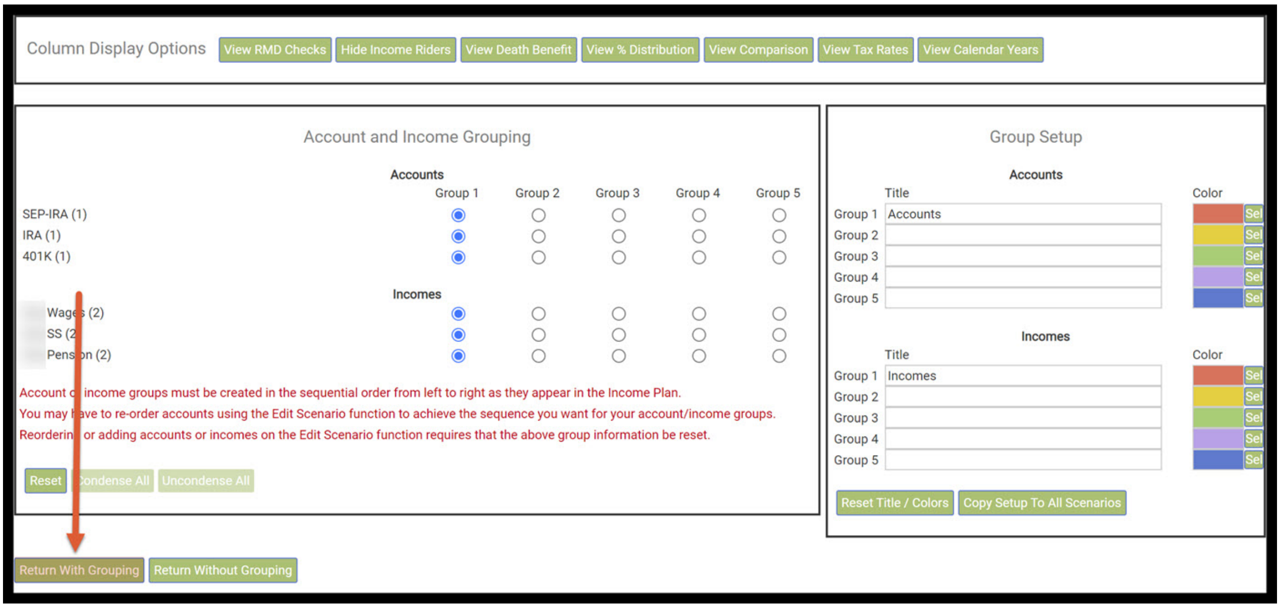
Step 10: Account and Income Grouping Incomes: Click on the radio buttion for which group you would like the incomes to be under.



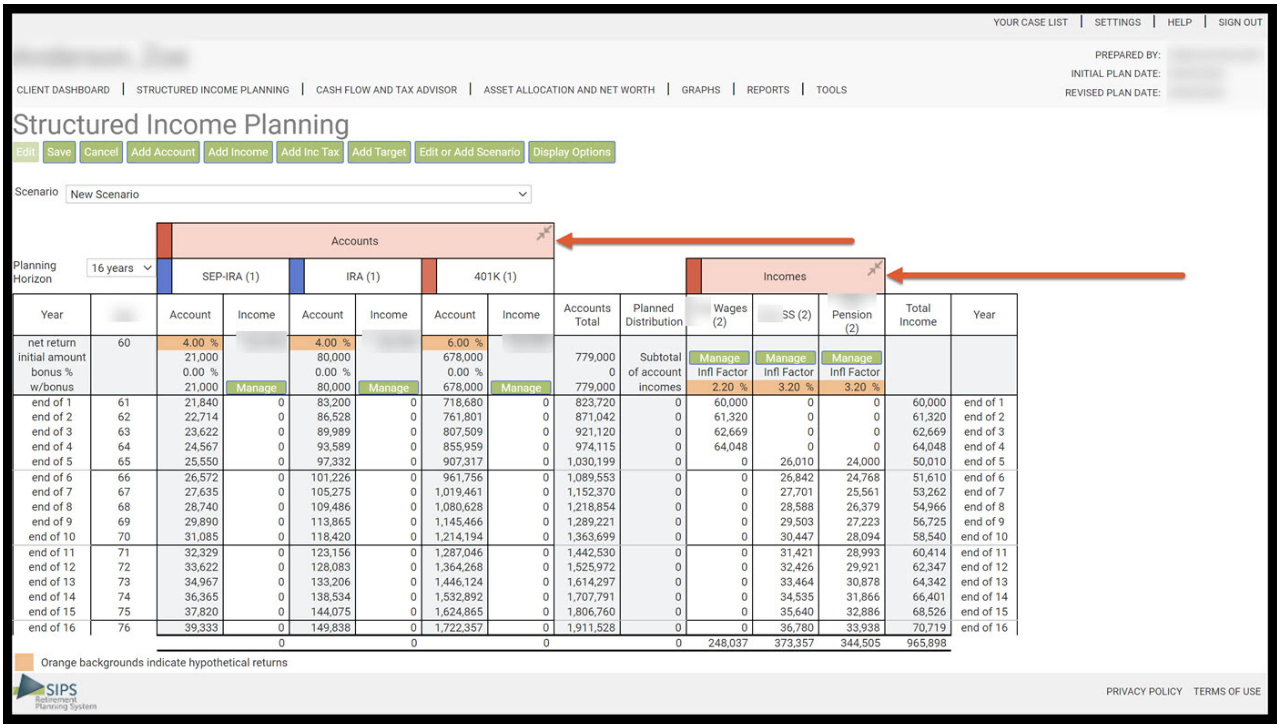
Step 11: Reset: To reset the Account and Income Group, click on the green reset button located in the lefthand side of the box. The radio buttons will go back to the default setting.



Step 12: Return with Grouping: Click on the green Return with Group button to return back to the Structured Income Plan.



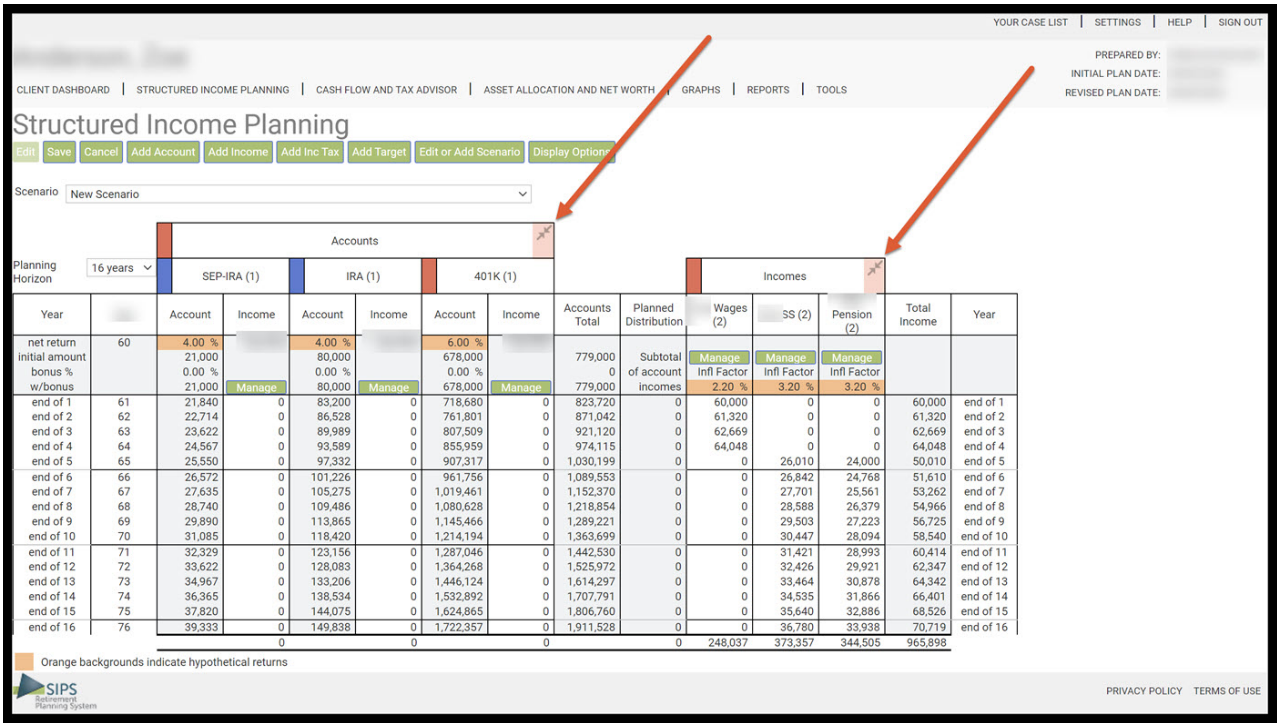
Step 13: Structured Income Planning Page: New title row should appear on the structured income planning page along with the color that you have selected.



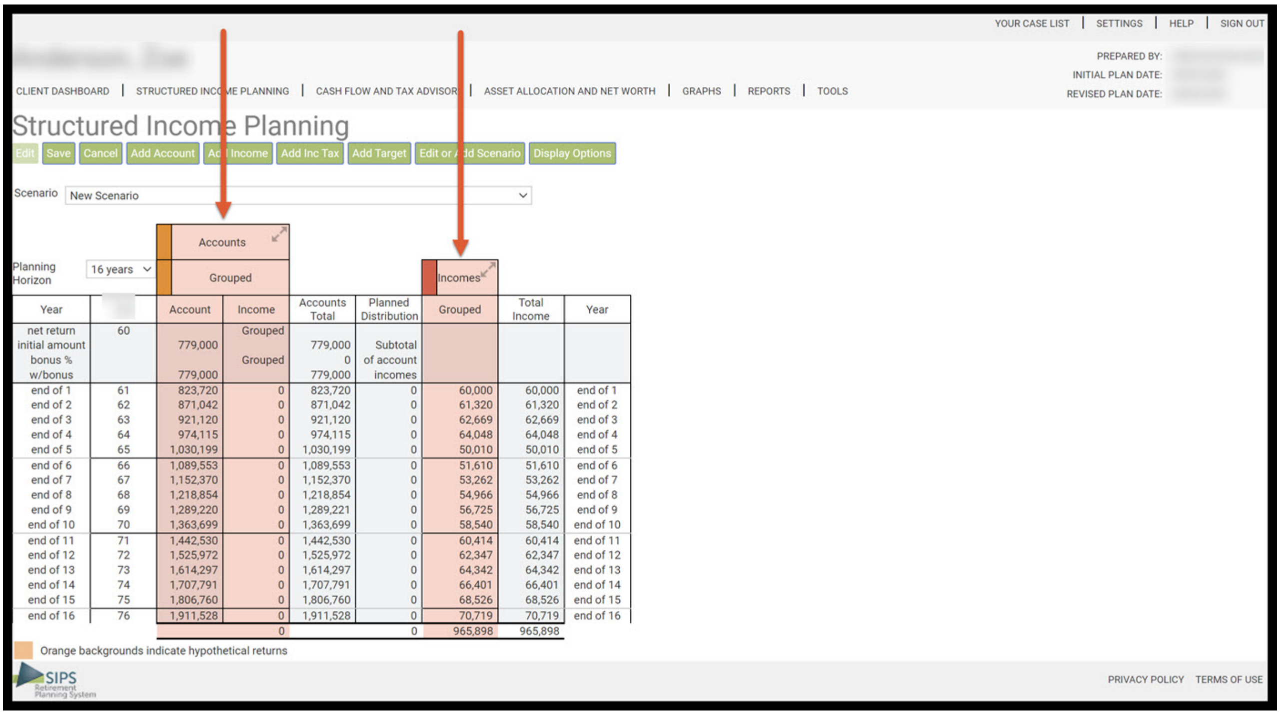
		SEP-IRA (1)		IRA (1)		401K (1)								
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return	60	4.00 %		4.00 %		6.00 %								
initial amount		21,000		80,000		678,000		779,000	Subtotal	Manage	Manage	Manage		
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor		
w/bonus		21,000	Manage	80,000	Manage	678,000	Manage	779,000	incomes	2.20 %	3.20 %	3.20 %		
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669	end of 3
end of 4	64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	50,010	end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	51,610	end of 6
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	25,561	53,262	end of 7
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	26,379	54,966	end of 8
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	27,223	56,725	end of 9
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	28,094	58,540	end of 10
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	28,993	60,414	end of 11
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	29,921	62,347	end of 12
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	30,878	64,342	end of 13
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	31,866	66,401	end of 14
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	32,886	68,526	end of 15
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	33,938	70,719	end of 16
			0		0		0		0	248,037	373,357	344,505	965,898	

Orange backgrounds indicate hypothetical returns

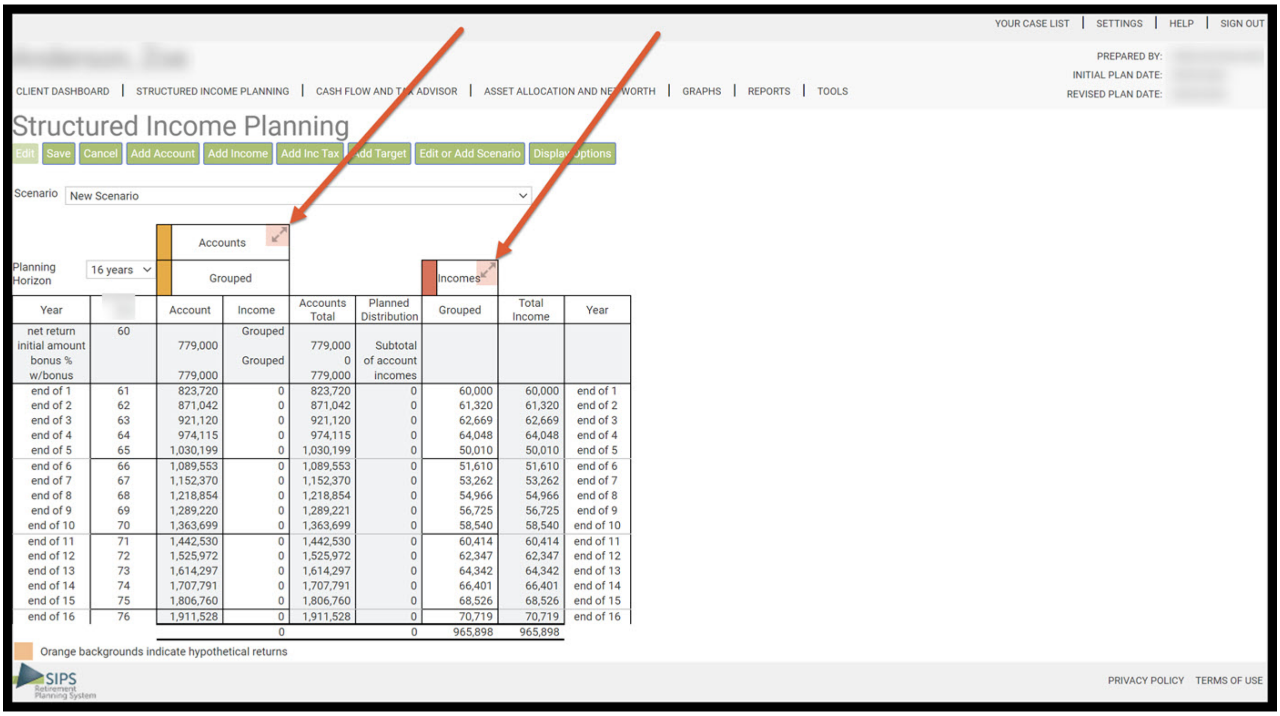
Step 14: Compressing the Groupings: To group all the columns together and get the total monetary amount, click on the diagonal carrot arrow located in the upper lefthand side of the row title.



Step 15: Structured Income Planning Page: The accounts column should be combined into one showing the total monetary amounts. The incomes columns should be combined into one showing the total monetary amounts.

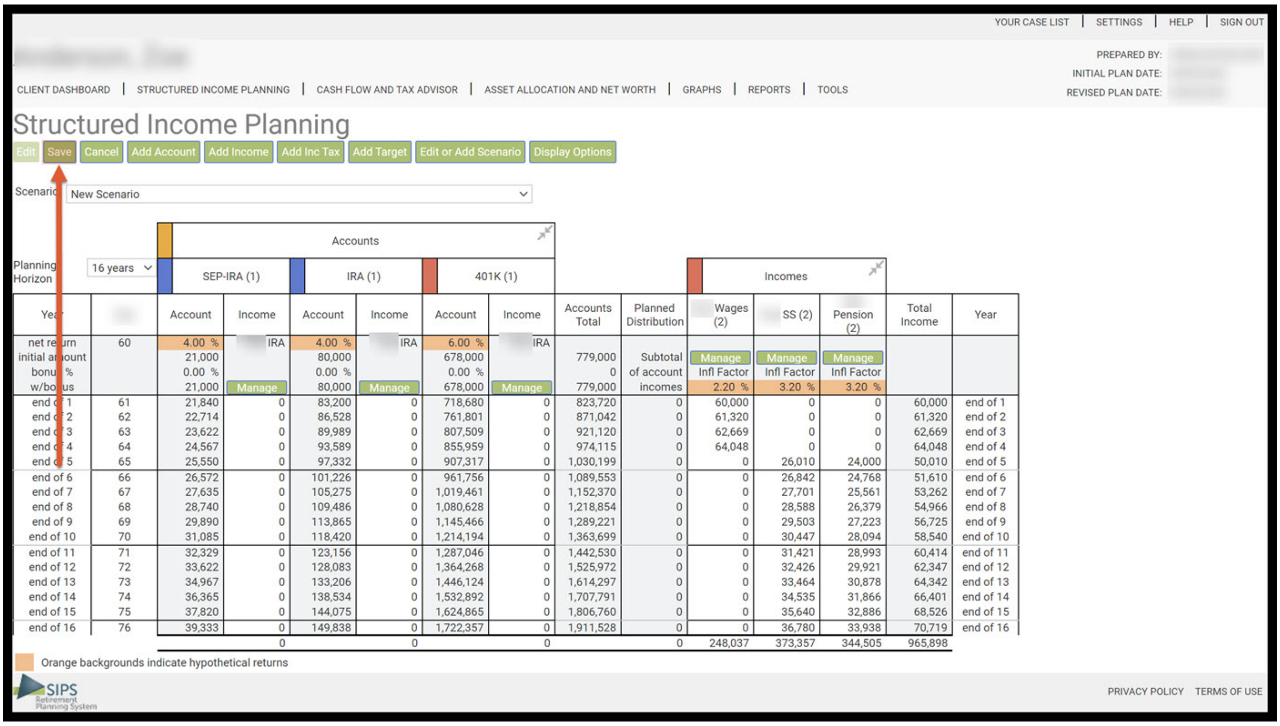


Step 16: Decompressing the Groupings: Double click on the diagonal carrot arrow located in the upper righthand row for the accounts and incomes. This will decompress the grouping.



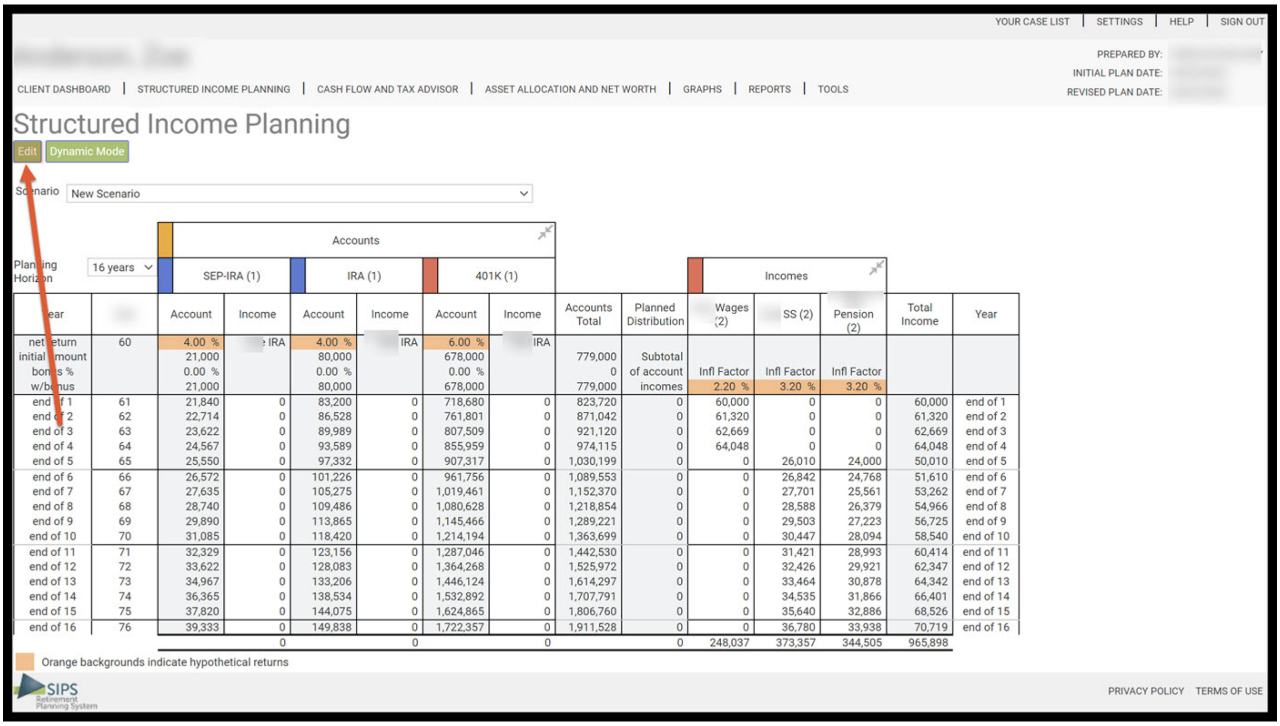
Year		Account	Income	Accounts Total	Planned Distribution	Grouped	Total Income	Year
net return	60		Grouped					
initial amount		779,000		779,000	Subtotal			
bonus %			Grouped	0	of account			
w/bonus		779,000		779,000	incomes			
end of 1	61	823,720	0	823,720	0	60,000	60,000	end of 1
end of 2	62	871,042	0	871,042	0	61,320	61,320	end of 2
end of 3	63	921,120	0	921,120	0	62,669	62,669	end of 3
end of 4	64	974,115	0	974,115	0	64,048	64,048	end of 4
end of 5	65	1,030,199	0	1,030,199	0	50,010	50,010	end of 5
end of 6	66	1,089,553	0	1,089,553	0	51,610	51,610	end of 6
end of 7	67	1,152,370	0	1,152,370	0	53,262	53,262	end of 7
end of 8	68	1,218,854	0	1,218,854	0	54,966	54,966	end of 8
end of 9	69	1,289,220	0	1,289,221	0	56,725	56,725	end of 9
end of 10	70	1,363,699	0	1,363,699	0	58,540	58,540	end of 10
end of 11	71	1,442,530	0	1,442,530	0	60,414	60,414	end of 11
end of 12	72	1,525,972	0	1,525,972	0	62,347	62,347	end of 12
end of 13	73	1,614,297	0	1,614,297	0	64,342	64,342	end of 13
end of 14	74	1,707,791	0	1,707,791	0	66,401	66,401	end of 14
end of 15	75	1,806,760	0	1,806,760	0	68,526	68,526	end of 15
end of 16	76	1,911,528	0	1,911,528	0	70,719	70,719	end of 16
			0		0	965,898	965,898	

Step 17: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

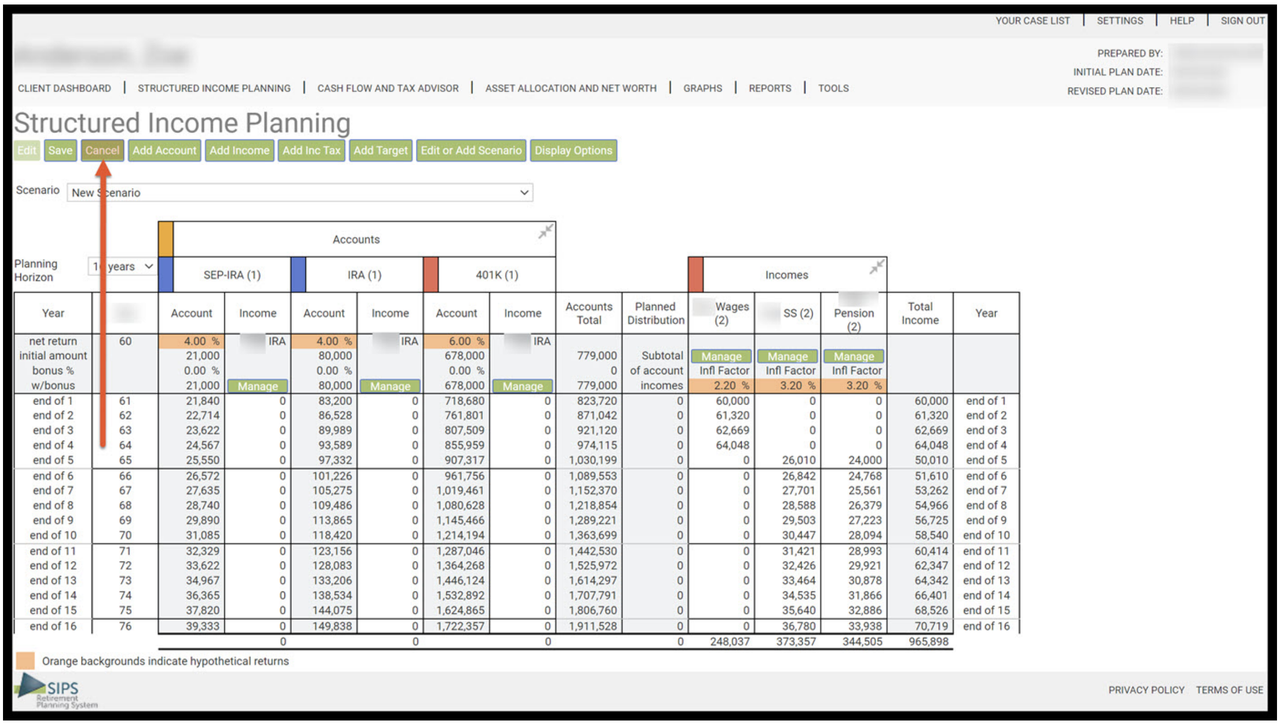


Year		SEP-IRA (1) Account	SEP-IRA (1) Income	IRA (1) Account	IRA (1) Income	401K (1) Account	401K (1) Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return	60	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA							
initial amount		21,000		80,000		678,000		779,000	Subtotal	Manage	Manage	Manage		
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor		
w/bonus		21,000	Manage	80,000	Manage	678,000	Manage	779,000	incomes	2.20 %	3.20 %	3.20 %		
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669	end of 3
end of 4	64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	50,010	end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	51,610	end of 6
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	25,561	53,262	end of 7
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	26,379	54,966	end of 8
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	27,223	56,725	end of 9
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	28,094	58,540	end of 10
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	28,993	60,414	end of 11
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	29,921	62,347	end of 12
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	30,878	64,342	end of 13
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	31,866	66,401	end of 14
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	32,886	68,526	end of 15
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	33,938	70,719	end of 16
			0		0		0		0	248,037	373,357	344,505	965,898	

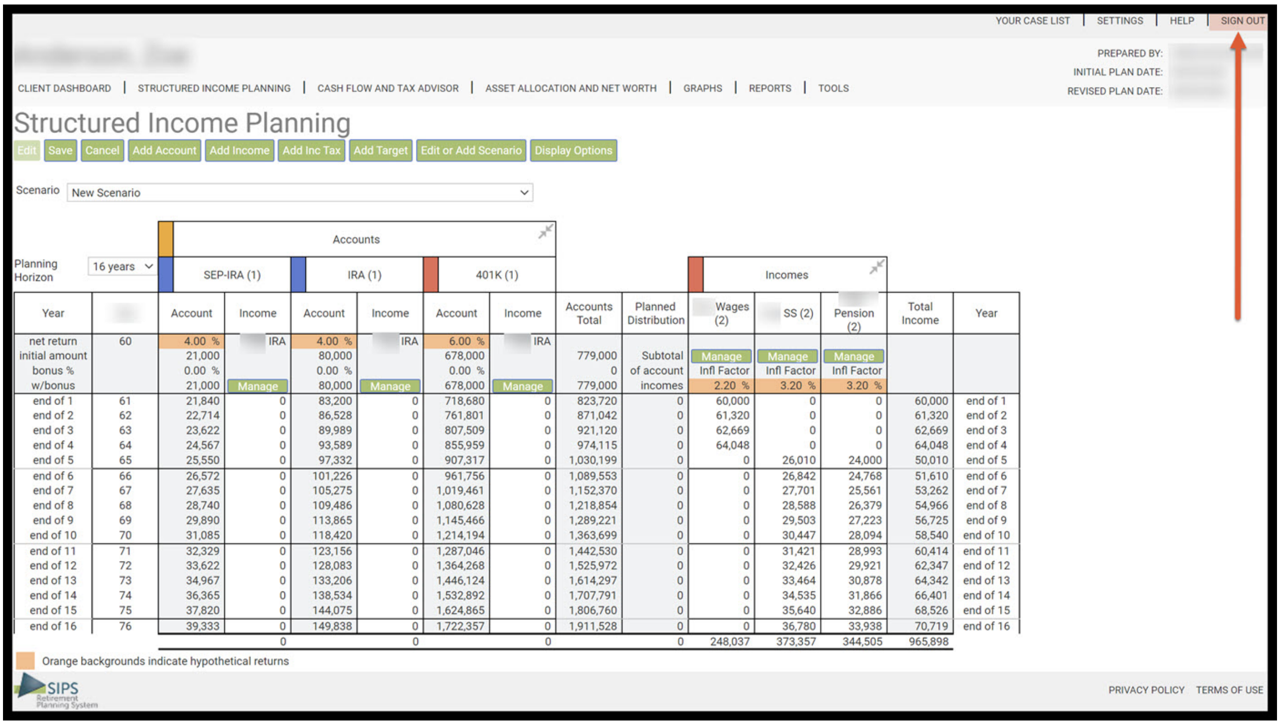
Step 18: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 19: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 20: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



		SEP-IRA (1)		IRA (1)		401K (1)				Wages (2)	SS (2)	Pension (2)		
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
net return	60	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA							
initial amount		21,000		80,000		678,000		779,000	Subtotal	Manage	Manage	Manage		
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor		
w/bonus		21,000	Manage	80,000	Manage	678,000	Manage	779,000	incomes	2.20 %	3.20 %	3.20 %		
end of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669	end of 3
end of 4	64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	50,010	end of 5
end of 6	66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	51,610	end of 6
end of 7	67	27,635	0	105,275	0	1,019,461	0	1,152,370	0	0	27,701	25,561	53,262	end of 7
end of 8	68	28,740	0	109,486	0	1,080,628	0	1,218,854	0	0	28,588	26,379	54,966	end of 8
end of 9	69	29,890	0	113,865	0	1,145,466	0	1,289,221	0	0	29,503	27,223	56,725	end of 9
end of 10	70	31,085	0	118,420	0	1,214,194	0	1,363,699	0	0	30,447	28,094	58,540	end of 10
end of 11	71	32,329	0	123,156	0	1,287,046	0	1,442,530	0	0	31,421	28,993	60,414	end of 11
end of 12	72	33,622	0	128,083	0	1,364,268	0	1,525,972	0	0	32,426	29,921	62,347	end of 12
end of 13	73	34,967	0	133,206	0	1,446,124	0	1,614,297	0	0	33,464	30,878	64,342	end of 13
end of 14	74	36,365	0	138,534	0	1,532,892	0	1,707,791	0	0	34,535	31,866	66,401	end of 14
end of 15	75	37,820	0	144,075	0	1,624,865	0	1,806,760	0	0	35,640	32,886	68,526	end of 15
end of 16	76	39,333	0	149,838	0	1,722,357	0	1,911,528	0	0	36,780	33,938	70,719	end of 16
			0		0		0		0	248,037	373,357	344,505	965,898	

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.