

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.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, it says 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main heading is 'Structured Income Planning' with an 'Edit' button highlighted in green and 'Dynamic Mode' selected. A 'Scenario' dropdown menu is set to 'New Scenario'. The 'Planning Horizon' is set to '16 years'. Below this, there are three columns for account types: 'SEP-IRA (1)', 'IRA (1)', and '401K (1)'. The main table has columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Wages (2)', 'SS (2)', 'Pension (2)', 'Total Income', and 'Year'. The table shows data from year 60 to 76. An orange background highlights the 'Income' column for years 60-65, indicating hypothetical returns. A red arrow points to the 'Edit' button.

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
60	4.00 %	4.00 %	6.00 %	779,000	0	779,000	0	60,000	0	0	60,000	end of 1	
61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	60,000	end of 1	
62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	61,320	end of 2	
63	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	62,669	end of 3	
64	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	64,048	end of 4	
65	25,550	0	97,332	0	907,317	0	1,030,199	0	0	26,010	24,000	50,010	end of 5
66	26,572	0	101,226	0	961,756	0	1,089,553	0	0	26,842	24,768	51,610	end of 6
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
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
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
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
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
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
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
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
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
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	0	0	0	248,037	373,357	344,505	965,898	

Orange backgrounds indicate hypothetical returns

SIPS Planning System

PRIVACY POLICY TERMS OF USE

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

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: New Scenario

Planning Horizon: 16 years

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

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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

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

	Group 1	Group 2	Group 3	Group 4	Group 5
SEP-IRA (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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
Group 1	Accounts	Set
Group 2		Set
Group 3		Set
Group 4		Set
Group 5		Set

Incomes

Group	Title	Color
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: Color Selection Accounts: Click on the green Set button next to the color of the title to select which color you would like the group title to be.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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
Group 1	Accounts	■ Sel
Group 2		■ Sel
Group 3		■ Sel
Group 4		■ Sel
Group 5		■ Sel

Incomes

Group	Title	Color
Group 1	Incomes	■ Sel
Group 2		■ Sel
Group 3		■ Sel
Group 4		■ Sel
Group 5		■ Sel

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

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

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

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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
Group 1	Accounts	■ Sel
Group 2		■ Sel
Group 3		■ Sel
Group 4		■ Sel
Group 5		■ Sel

Incomes

Group	Title	Color
Group 1	Incomes	■ Sel
Group 2		■ Sel
Group 3		■ Sel
Group 4		■ Sel
Group 5		■ Sel

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

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

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.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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		Color
Group 1	<input type="text" value="Accounts"/>	<input checked="" type="radio"/> Set
Group 2	<input type="text"/>	<input type="radio"/> Set
Group 3	<input type="text"/>	<input type="radio"/> Set
Group 4	<input type="text"/>	<input type="radio"/> Set
Group 5	<input type="text"/>	<input type="radio"/> Set
Incomes		Color
Group 1	<input type="text" value="Incomes"/>	<input checked="" type="radio"/> Set
Group 2	<input type="text"/>	<input type="radio"/> Set
Group 3	<input type="text"/>	<input type="radio"/> Set
Group 4	<input type="text"/>	<input type="radio"/> Set
Group 5	<input type="text"/>	<input type="radio"/> Set

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

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

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.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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		Color
Group 1	<input type="text" value="Accounts"/>	<input checked="" type="radio"/> Set
Group 2	<input type="text"/>	<input type="radio"/> Set
Group 3	<input type="text"/>	<input type="radio"/> Set
Group 4	<input type="text"/>	<input type="radio"/> Set
Group 5	<input type="text"/>	<input type="radio"/> Set
Incomes		Color
Group 1	<input type="text" value="Incomes"/>	<input checked="" type="radio"/> Set
Group 2	<input type="text"/>	<input type="radio"/> Set
Group 3	<input type="text"/>	<input type="radio"/> Set
Group 4	<input type="text"/>	<input type="radio"/> Set
Group 5	<input type="text"/>	<input type="radio"/> Set

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

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

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.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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
Group 1	Accounts	■ Set
Group 2		■ Set
Group 3		■ Set
Group 4		■ Set
Group 5		■ Set

Incomes

Group	Title	Color
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 9: Account and Income Grouping Accounts: Click on the radio button for which group you would like the accounts to be under.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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
Group 1	Accounts	■ Set
Group 2		■ Set
Group 3		■ Set
Group 4		■ Set
Group 5		■ Set

Incomes

Group	Title	Color
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 10: Account and Income Grouping Incomes: Click on the radio button for which group you would like the incomes to be under.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (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"/>
401K (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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		Color
Group 1	Accounts	■ Set
Group 2		■ Set
Group 3		■ Set
Group 4		■ Set
Group 5		■ Set

Incomes		Color
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 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.

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

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
SEP-IRA (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IRA (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
401K (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (2)	<input 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		Color
Group 1	Accounts	■ Set
Group 2		■ Set
Group 3		■ Set
Group 4		■ Set
Group 5		■ Set

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

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
SEP-IRA (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"/>
401K (1)	<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
Wages (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS (2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension (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
Group 1	Accounts	■ Set
Group 2		■ Set
Group 3		■ Set
Group 4		■ Set
Group 5		■ Set

Incomes

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

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: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

Structured Income Planning

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

Scenario: [New Scenario](#)

Planning Horizon: 16 years

Year	Accounts						Accounts Total	Planned Distribution	Incomes			Total Income	Year
	SEP-IRA (1)	IRA (1)	401K (1)	Wages (2)	SS (2)	Pension (2)							
net return	4.00 %	4.00 %	6.00 %				779,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
initial amount	21,000	80,000	678,000				779,000						
bonus % w/bonus	0.00 %	0.00 %	0.00 %				0						
end of 1	61	21,840	0	83,200	0	718,680	823,720	0	60,000	0	0	60,000	end of 1
end of 2	62	22,714	0	86,528	0	761,801	871,042	0	61,320	0	0	61,320	end of 2
end of 3	63	23,622	0	89,989	0	807,509	921,120	0	62,669	0	0	62,669	end of 3
end of 4	64	24,567	0	93,589	0	855,959	974,115	0	64,048	0	0	64,048	end of 4
end of 5	65	25,550	0	97,332	0	907,317	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	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	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	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	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	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	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	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	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	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	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	1,911,528	0	0	36,780	33,938	70,719	end of 16
			0		0				248,037	373,357	344,505	965,898	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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.

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

Scenario: New Scenario

Planning Horizon: 16 years

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

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

PRIVACY POLICY | TERMS OF USE

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.

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

Scenario: New Scenario

Planning Horizon: 16 years

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

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

PRIVACY POLICY | TERMS OF USE

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: New Scenario

Planning Horizon: 16 years

Year	Account	Income	Accounts		Planned Distribution	Grouped	Total Income	Year
			Accounts Total	Subtotal of account incomes				
net return	60	779,000	Grouped	779,000	0			
initial amount		779,000	Grouped	779,000	0			
bonus % w/bonus		779,000						
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	0	965,898	965,898	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: New Scenario

Planning Horizon: 16 years

Year	Account	Income	Accounts			Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year
			SEP-IRA (1)	IRA (1)	401K (1)						
net return	60	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA				
initial amount		21,000	80,000	80,000	678,000	779,000	0				
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	779,000	0				
end of 1	61	21,000	Manage	80,000	Manage	678,000	Manage				
end of 2	62	21,000									
end of 3	63	21,000									
end of 4	64	21,000									
end of 5	65	21,000									
end of 6	66	21,840	0	83,200	0	718,680	0	60,000	0	60,000	end of 1
end of 7	67	22,714	0	86,528	0	761,801	0	61,320	0	61,320	end of 2
end of 8	68	23,622	0	89,989	0	807,509	0	62,669	0	62,669	end of 3
end of 9	69	24,567	0	93,589	0	855,959	0	64,048	0	64,048	end of 4
end of 10	70	25,550	0	97,332	0	907,317	0	64,048	0	64,048	end of 5
end of 11	71	26,572	0	101,226	0	961,756	0	26,842	24,000	50,010	end of 6
end of 12	72	27,635	0	105,275	0	1,019,461	0	27,701	25,561	53,262	end of 7
end of 13	73	28,740	0	109,486	0	1,080,628	0	28,588	26,379	54,966	end of 8
end of 14	74	29,890	0	113,865	0	1,145,466	0	29,503	27,223	56,725	end of 9
end of 15	75	31,085	0	118,420	0	1,214,194	0	30,447	28,094	58,540	end of 10
end of 16	76	32,329	0	123,156	0	1,287,046	0	31,421	28,993	60,414	end of 11
end of 17	77	33,622	0	128,083	0	1,364,268	0	32,426	29,921	62,347	end of 12
end of 18	78	34,967	0	133,206	0	1,446,124	0	33,464	30,878	64,342	end of 13
end of 19	79	36,365	0	138,534	0	1,532,892	0	34,535	31,866	66,401	end of 14
end of 20	80	37,820	0	144,075	0	1,624,865	0	35,640	32,886	68,526	end of 15
end of 21	81	39,333	0	149,838	0	1,722,357	0	36,780	33,938	70,719	end of 16
			0	0	0	0	0	248,037	373,357	344,505	965,898

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

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

Scenario:

Planning Horizon: 16 years

Year	Accounts						Accounts Total	Planned Distribution	Incomes			Total Income	Year
	SEP-IRA (1)	IRA (1)	IRA (1)	IRA (1)	IRA (1)	IRA (1)			Wages (2)	SS (2)	Pension (2)		
net return	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA	779,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %		
initial amount	21,000		80,000		678,000		779,000						
bonus % w/bonus	0.00 %		0.00 %		0.00 %		0						
end of 1	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1
end of 2	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2
end of 3	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669	end of 3
end of 4	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	64,048	end of 4
end of 5	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	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	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	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	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	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	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	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	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	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	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	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			248,037	373,357	344,505	965,898	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

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

Scenario:

Planning Horizon: 1 years

Year	Accounts						Accounts Total	Planned Distribution	Incomes			Total Income	Year
	SEP-IRA (1)	IRA (1)	IRA (1)	IRA (1)	IRA (1)	IRA (1)			Wages (2)	SS (2)	Pension (2)		
net return	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA	779,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %		
initial amount	21,000		80,000		678,000		779,000						
bonus % w/bonus	0.00 %		0.00 %		0.00 %		0						
end of 1	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1
end of 2	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2
end of 3	23,622	0	89,989	0	807,509	0	921,120	0	62,669	0	0	62,669	end of 3
end of 4	24,567	0	93,589	0	855,959	0	974,115	0	64,048	0	0	64,048	end of 4
end of 5	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	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	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	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	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	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	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	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	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	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	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	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			248,037	373,357	344,505	965,898	

Orange backgrounds indicate hypothetical returns

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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.

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: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

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	Accounts						Accounts Total	Planned Distribution	Incomes			Total Income	Year	
	SEP-IRA (1)		IRA (1)		401K (1)				Wages (2)	SS (2)	Pension (2)			
	Account	Income	Account	Income	Account	Income								
net return	60	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA	779,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor		
initial amount		21,000	80,000	80,000	678,000	678,000	678,000	779,000		2.20 %	3.20 %	3.20 %		
w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0						
		21,000	80,000	80,000	678,000	678,000	678,000	779,000						
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

SIPS Retirement Planning System

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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.