Changing the Order of the Account and Incomes on the Structured Income Planning Page

09/17/2024 1:35 pm EDT

Within the structured income plan you can change the order of the accounts and income that are shown. Below is a step-by-step guide for changing the order of the accounts and income on the structured income plan.

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

															YOUR	CASE LIST SET	TINGS HE	LP SIGN OUT
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CLIEN	T DASHBO	ARD STRU	ICTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS	TOOLS			REVISED P		
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Planni	na	16 years ∨																
Hori o		To years	SEP-	IRA (1)	IR.	A (1)	40	1K (1)										
	rear		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Total Income	Year			
	return	60	4.00 %	IRA	4.00 %	IRA	6.00 %	IRA					(=/			8		
	amount		21,000 0.00 %		80,000 0.00 %		678,000 0.00 %		779,000	Subtotal of account	Infl Factor	Infl Factor	Infl Factor					
w/			21,000		80,000		678,000		779,000	incomes	2.20 %	3.20 %	3.20 %					
	of 1	61	21,840	0	83,200	0	718,680	0	823,720	0	60,000	0	0	60,000	end of 1			
	of 2 of 3	62	22,714	0	86,528	0	761,801	0	871,042	0	61,320	0	0	61,320	end of 2			
	c of 3	63 64	23,622 24,567	0	89,989 93,589	0	807,509 855,959	0	921,120 974,115	0	62,669 64,048	0	0	62,669 64,048	end of 3 end of 4			
	o of 5	65	25,550	ő	97,332	0	907,317	0	1,030,199	0	04,040	26,010	24,000	50,010	end of 5			
	d 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			
en	d 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			
	d 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			
	d 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			
	d of 10 d of 11	70 71	31,085 32,329	0	118,420 123,156	0	1,214,194	0	1,363,699	0	0	30,447 31,421	28,094 28,993	58,540 60,414	end of 10 end of 11			
	d of 12	72	32,329	0	123,156	0	1,364,268	0	1,442,530	0	0	31,421	28,993	62,347	end of 11 end of 12			
	d 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 12			
	d 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			
	d 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	d 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			
	Deeners he	-	linete humethe	0		0		0		0	248,037	373,357	344,505	965,898				
		ckgrounds inc	incate hypothe	eucai returns														750110.0511-5
Rept	tirement anning System	m														P	RIVACY POLICY	TERMS OF USE

Step 2: Edit or Add Scenario: Click on the green Edit or Add Scenario button underneath the Structured Income Planning sub-heading.

															PREPARED BY: INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STRU	ICTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS 1	TOOLS			REVISED PLAN DATE:	
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	Cancel Add A				dd Target	dit or Add So	enario Dier	alay Options								
un save c	Add A		A				enano Disp	ay options								
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INCO	v Scenario					-										
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lanning lorizon	16 years ∨	SEP-	IRA (1)	IR	A (1)	40	1K (1)									
								10					T			
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension	Total Income	Year		
net return	60	4.00 %	IRA	4.00 %	IRA	6.0 %	IRA					(2)				
nitial amount		21,000		80,000		678, 00		779,000	Subtotal	Manage	Manage	Manage				
bonus %		0.00 %		0.00 %		0.0 %		0	of account	Infl Factor	Infl Factor	Infl Factor				
w/bonus end of 1	61	21,000 21,840	Manage 0	80,000 83,200	Manage 0	678, 00 718, 80	Manage 0	779,000 823,720	incomes 0	2.20 %	3.20 %	3.20 %	60,000	end of 1		
end of 2	62	21,840	0	86,528	0	761, 01	0	871.042	0	61,320	0	0	61,320	end of 2		
end of 3	63	23,622	0	89,989	0	807, 09	0	921,120	0	62,669	Ő	0	62,669	end of 3		
end of 4	64	24,567	0	93,589	0	855. 59	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 end of 12	71 72	32,329 33,622	0	123,156 128.083	0	1,287,046 1,364,268	0	1,442,530 1,525,972	0	0	31,421 32,426	28,993 29,921	60,414 62.347	end of 11 end of 12		
end of 12 end of 13	72	33,622	0	128,083	0	1,364,268	0	1,525,972		0	32,426	30,878	64,342	end of 12 end of 13		
end of 13	74	36,365	0	138,534	0	1,446,124	0	1,014,297	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 ba	- ackgrounds ind	licate hypothe	etical returns													

Step 3: Accounts Up and Down Carrot Arrows: Pick which account you would like to move up or down in the display. Click on which carrot arrow you would like to move the account.

					YOU	R CASE LIST	SETTINGS	HELP	SIGN OUT
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Sat a Can									
Gal									
Scenario		New Scenario		~					
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	e Current Scenario As								
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	401K (1)				Replicate Remove Replicate Remove				
						Add Account	Common	Replicate	New
			-						
Incomes	Wages (2)	Also Used I	n.		Replicate Remove				
술두 술두 술두	SS (2)				Replicate Remove				
豪華	Pension (2)				Replicate Remove				
					~	Add Income	Common	Replicate	New
Target		Also Used I	n						
					~	Add Target	Common	Replicate	New
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Tax		AISO USED			~	Add Tax	Common	Replicate	New
SIP	S						PRIVACY	POLICY TE	RMS OF USE
Retiremer Planning S	n. System								

Step 4: Incomes Up and Down Carrot Arrows: Pick which income you would like to move up or down in the display. Click on which carrot arrow you would like to move the account.

			YOUF	CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Scenar	rio						
Scenario Delete Current Scenario ename Current Scenario To Create New Scenario As splicate Current Scenario As	New Scenario	~					
Accounts SEP-IRA (1) IRA (1) 401K (1)	Also Used in		Replicate Remove Replicate Remove Replicate Remove	Add Account	Common F		
Inc. mes	Also Used In				Common	Replicate	New
Incomes Wages (2) SS (2) Pension (2)			Replicate Remove Replicate Remove Replicate Remove	Add Income	Common	Replicate	New
Target	Also Used In				Common F		New
Тах	Also Used In		~ ~	Add Tax	Common	Replicate	New
SIPS Reterment Planning System					PRIVACY P	OLICY TER	RMS OF USE

Step 5: Save: Click on the Save button underneath the Manage Scenario subheading.

				YOUI	CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Scenar	io							
Save Cancel								
Scinario	Texas and texas							
Delete Current Scenario	New Scenario	~						
Rename Current Scenario To								
Create New Scenario As								
eplicate Current Scenario As								
Accounts	Also Used In							
SEP-IRA (1) IRA (1)				Replicate Remove				
401K (1)				Replicate Remove Replicate Remove				
				~	Add Accour	Common	Replicate	New
Incomes	Also Used In							
Wages (2) SS (2) Pension (2)				Replicate Remove Replicate Remove				
Pension (2)				Replicate Remove				
				~	Add Incom	Common	Replicate	New
Target	Also Used In				Add Tornet			
				~	Add Target	Common	Replicate	New
Тах	Also Used In			~	Add Tax	0	Replicate	New
				Ŷ	Hud Tux	Common	Replicate	New
SIPS Retirement Planning System						PRIVAC	Y POLICY T	ERMS OF USE

Step 6: Structured Income Plan: The edits should be reflected in the structured income plan.

IENT DASHBO	ARD STRU		ME PLANNING	L CASH FLO	OW AND TAX A		SSET ALLOCA	TION AND NET	WORTH I C	RAPHS R	EPORTS 1	00LS			PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:	
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tructu	ured In	ncom	e Plar	ning												
lit Save C	ancel Add A	Account Add	Income A	dd Inc Tax A	dd Target	dit or Add So	enario Disp	ay Options								
enario New	Scenario						~									
		_		_		_		1								
rizon	16 years ∨	SEP-	IRA (1)	401	IK (1)	IR	A (1)									
								10			- 1					
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	Pension	SS (2)	Total	Year		
net return	60	4.00 %	-	6.00 %		4.00 %	-			(-/	(2)					
itial amount	00	21,000		678,000		80,000		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	678,000	Manage	80,000	Manage	779,000	incomes	2.20 %	3.20 %	3.20 %				
end of 1	61	21,840	0	718,680	0	83,200	0	823,720	0	60,000	0	0	60,000	end of 1		
end of 2	62	22,714	0	761,801	0	86,528	0	871,042	0	61,320	0	0	61,320	end of 2		
end of 3	63	23,622	0	807,509	0	89,989	0	921,120	0	62,669	0	0	62,669	end of 3		
end of 4 end of 5	64 65	24,567	0	855,959	0	93,589	0	974,115	0	64,048	0	0	64,048	end of 4 end of 5		
		25,550	-	907,317		97,332		1,030,199		0	24,000	26,010	50,010			
end of 6 end of 7	66 67	26,572 27.635	0	961,756 1,019,461	0	101,226 105,275	0	1,089,553 1,152,370	0	0	24,768 25,561	26,842 27,701	51,610 53,262	end of 6 end of 7		
end of 8	68	28,740	0	1,080,628	0	109,486	0	1,132,370	0	0	26,379	28,588	54,966	end of 8		
end of 9	69	29,890	0	1,145,466	ő	113,865	ő	1,289,220	0	0	27,223	29,503	56,725	end of 9		
end of 10	70	31,085	0	1,214,194	0	118,420	0	1,363,699	0	0	28,094	30,447	58,540	end of 10		
end of 11	71	32,329	0	1,287,046	0	123,156	0	1,442,530	0	0	28,993	31,421	60,414	end of 11		
end of 12	72	33,622	0	1,364,268	0	128,083	0	1,525,972	0	0	29,921	32,426	62,347	end of 12		
end of 13	73	34,967	0	1,446,124	0	133,206	0	1,614,297	0	0	30,878	33,464	64,342	end of 13		
end of 14	74	36,365	0	1,532,892	0	138,534	0	1,707,791	0	0	31,866	34,535	66,401	end of 14		
end of 15	75	37,820	0	1,624,865	0	144,075	0	1,806,760	0	0	32,886	35,640	68,526	end of 15		
end of 16	76	39,333	0	1,722,357	0	149,838	0	1,911,528	0	248.037	33,938 344,505	36,780 373,357	70,719 965,898	end of 16		
end of 10																

Step 7: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

														YOUR	CASE LIST S	ETTINGS	HELP SIGN OUT
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CLIENT DASHBO	ARD STRU	CIURED INCOM	ME PLANNING	CASH FL	JW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH C	SKAPHS F	EPORTS	IUULS			REVISE	PLAN DATE	
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Scenario New	/ Scenario						~										
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Planning Horizon	16 years ∽	SEP-	IRA (1)	40	IK (1)	IR	A (1)										
Year	-	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	Pension (2)	SS (2)	Total Income	Year			
net return	60	4.00 %	IRA	6.00 %	IRA	4.00 %	IRA										
initial amount bonus %		21,000 0.00 %		678,000 0.00 %		80,000 0.00 %		779,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor					
w/bonus		21,000	Manage	678,000	Manage	80,000	Manage	779,000	incomes	2.20 %	3.20 %	3.20 %	1				
end of 1	61	21,840	0	718,680	0	83,200	0	823,720	0	60,000	0	0	60,000	end of 1			
end of 2	62	22,714	0	761,801	0	86,528	0	871,042	0	61,320	0	0	61,320	end of 2			
end of 3	63	23,622	0	807,509	0	89,989	0	921,120	0	62,669	0	0	62,669	end of 3			
end of 4 end of 5	64 65	24,567 25.550	0	855,959 907,317	0	93,589 97,332	0	974,115 1,030,199	0	64,048 0	0 24.000	0 26,010	64,048 50,010	end of 4 end of 5			
end of 5 end of 6	= 05 66	25,550	0	907,317	0	97,332	0	1,030,199	0	0	24,000	26,010	51,610	end of 5 end of 6			
end of 7	67	27,635	0	1,019,461	0	105,275	0	1,152,370		0	25,561	27,701	53,262	end of 7			
end of 8	68	28,740	0	1,080,628	ő	109,486	0	1,218,854	o o	0	26.379	28,588	54,966	end of 8			
end of 9	69	29,890	0	1,145,466	0	113,865	0	1,289,220	0	0	27,223	29,503	56,725	end of 9			
end of 10	70	31,085	0	1,214,194	0	118,420	0	1,363,699	0	0	28,094	30,447	58,540	end of 10			
end of 11	71	32,329	0	1,287,046	0	123,156	0	1,442,530	0	0	28,993	31,421	60,414	end of 11			
end of 12	72	33,622	0	1,364,268	0	128,083	0	1,525,972	0	0	29,921	32,426	62,347	end of 12			
end of 13	73	34,967	0	1,446,124	0	133,206	0	1,614,297	0	0	30,878	33,464	64,342	end of 13			
end of 14 end of 15	74 75	36,365	0	1,532,892	0	138,534	0	1,707,791	0	0	31,866 32,886	34,535	66,401	end of 14			
end of 15 end of 16	75	37,820 39,333	0	1,624,865	0	144,075 149,838	0	1,806,760	0	0	32,886	35,640 36,780	68,526 70,719	end of 15 end of 16			
enu of 16	70	39,333	0	1,722,357	0	149,030	0	1,911,528	0	248,037	344,505	36,780	965,898	enu of 16			
Orange ba	- ckgrounds ind	licate hypothe	etical returns														
SIPS																	
Retirement Planning System																PRIVACY PC	LICY TERMS OF USE
Planning system		_	_	_	_				_	_	_	_		_		_	

Step 8: 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.

NT DASHBO	ARD STRU	JCTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS 1	OOLS			PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:	
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ario New	Scenario						~									
ing	16 years 🗸	SED.	IRA (1)	401	K (1)	IR	A (1)									
pn		UL I	ilos (1)	40	K(I)		A(I)				-					
ear		Account	Income	Account	Income	Account	Income	Accounts	Planned	Wages	Pension	SS (2)	Total	Year		
- u					_			Total	Distribution	(2)	(2)	00(2)	Income			
et eturn	60	4.00 %	IRA	6.00 % 678.000	IRA	4.00 %	IRA	779.000	Subtotal							
al mount on s %		21,000 0.00 %		0.00 %		80,000 0.00 %		//9,000	of account	Infl Factor	Infl Factor	Infl Factor				
/benus		21,000		678,000		80,000		779,000	incomes	2.20 %	3.20 %	3.20 %				
nd f 1	61	21,840	0	718,680	0	83,200	0	823,720	0	60,000	0	0	60,000	end of 1		
nd of 2	62 63	22,714	0	761,801	0	86,528	0	871,042	0	61,320	0	0	61,320	end of 2 end of 3		
nd o 3 nd o 4	64	23,622 24,567	0	807,509 855,959	0	89,989 93,589	0	921,120 974,115	0	62,669 64,048	0	0	62,669 64,048	end of 3 end of 4		
nd of 5	65	25,550	ő	907,317	0	97,332	0	1,030,199	0	04,040	24,000	26,010	50,010	end of 5		
nd of	66	26,572	0	961,756	0	101,226	0	1,089,553	0	0	24,768	26,842	51,610	end of 6		
nd of 7	67	27,635	0	1,019,461	0	105,275	0	1,152,370	0	0	25,561	27,701	53,262	end of 7		
nd of 8 nd of 9	68 69	28,740 29,890	0	1,080,628	0	109,486 113.865	0	1,218,854	0	0	26,379 27.223	28,588 29,503	54,966 56,725	end of 8 end of 9		
d of 10	70	31.085	0	1,145,466	0	118,420	0	1,269,220	0	0	28.094	30,447	58,540	end of 10		
d of 11	71	32,329	0	1,287,046	0	123,156	0	1,442,530	0	0	28,993	31,421	60,414	end of 11		
nd of 12	72	33,622	0	1,364,268	0	128,083	0	1,525,972	0	0	29,921	32,426	62,347	end of 12		
nd of 13	73 74	34,967	0	1,446,124	0	133,206	0	1,614,297	0	0	30,878	33,464	64,342	end of 13		
nd of 14 nd of 15	74	36,365 37,820	0	1,532,892 1,624,865	0	138,534 144,075	0	1,707,791 1,806,760	0	0	31,866 32,886	34,535 35.640	66,401 68,526	end of 14 end of 15		
d of 16	76	39,333	0	1,024,803	0	149,838	0	1,911.528	0	0	33,938	36,780	70,719	end of 16		
			0		0		0		0	248,037	344,505	373,357	965,898			
	ekeneunde ine	dicate hypothe	etical returns													

Step 9: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

6															YOUR	CASE LIST SETTINGS	HELP SIGN OUT
																PREPARED BY:	
											-					INITIAL PLAN DATE:	
CLIENT DASHBO	ARD	STRU	CTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS	TOOLS			REVISED PLAN DATE:	
Structu	irec	l Ir	lcom	e Plar	nina												
				Income Ac		dd Target	Edit or Add Sc	operio Dier	lay Options								
Edit Save C	ancer	AUU A		A			cuit of Aud Sc	enano Disp	nay Options								
Scenario New	1							~									
New	Scenari	0						~									
	•																
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Planning Horizon	16 ye rs	~	SEP-	IRA (1)	40	1K (1)	IR	A (1)									
	-								Accounts	Planned	Manag			Total			
Year			Account	Income	Account	Income	Account	Income	Total	Distribution	Wages (2)	Pension (2)	SS (2)	Income	Year		
net return	60		4.00 %	IRA	6.00 %	IRA	4.00 %	IRA				(2)					
initial amount			21,000		678,000		80,000		779,000	Subtotal	Manage	Manage	Manage				
bonus % w/bonus		۱I	0.00 %	Manage	0.00 % 678,000	Manage	0.00 % 80,000	Manage	0 779,000	of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %	1			
end of 1	61	╈	21,840	Manage 0	718,680	manage 0	83,200	Manage 0	823,720	0	60,000	0.20	0	60,000	end of 1		
end of 2	62	N	22,714	0	761,801	0	86,528	0	871,042	0	61,320	0	0	61,320	end of 2		
end of 3	63		23,622	0	807,509	0	89,989	0	921,120	0	62,669	0	0	62,669	end of 3		
end of 4	64		24,567	0	855,959	0	93,589	0	974,115	0	64,048	0	0	64,048	end of 4		
end of 5	65	- 1	25,550	0	907,317	0	97,332	0	1,030,199	0	0	24,000	26,010 26,842	50,010	end of 5		
end of 6 end of 7	67		26,572 27,635	0	961,756 1,019,461	0	101,226 105,275	0	1,089,553 1,152,370	0	0	24,768 25,561	26,842	51,610 53,262	end of 6 end of 7		
end of 8	68		28,740	0	1,080,628	0	109,486	0	1,218,854	0	0	26,379	28,588	54,966	end of 8		
end of 9	69		29,890	0	1,145,466	0	113,865	0	1,289,220	0	0	27,223	29,503	56,725	end of 9		
end of 10	70		31,085	0	1,214,194	0	118,420	0	1,363,699	0	0	28,094	30,447	58,540	end of 10		
end of 11	71		32,329	0	1,287,046	0	123,156	0	1,442,530	0	0	28,993	31,421	60,414	end of 11		
end of 12	72		33,622	0	1,364,268	0	128,083	0	1,525,972	0	0	29,921	32,426	62,347	end of 12		
end of 13	73		34,967	0	1,446,124	0	133,206	0	1,614,297	0	0	30,878	33,464	64,342	end of 13		
end of 14 end of 15	74 75		36,365 37,820	0	1,532,892 1,624,865	0	138,534 144,075	0	1,707,791 1.806,760	0	0	31,866 32,886	34,535 35,640	66,401 68,526	end of 14 end of 15		
end of 15 end of 16	75	-	37,820	0	1,024,865	0	144,075	0	1,911,528	0	0	32,886	35,640	70,719	end of 15 end of 16		
	10	_	09,000	0	1,122,001	0	149,030	0	1,911,020	0	248,037	344,505	373,357	965,898			
Orange ba	ckgroun	ds ind	icate hypothe	•		0		0		0	2 10,001	0 14,000	0.0,007	200,000			
			11														
SIPS Retirement Planning System																PRIVACY PO	LICY TERMS OF USE
Pranning Syster	1																

Step 10: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

CLIENT DASHB	DARD STR	JCTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS	TOOLS			PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:	-
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lanning	16 years ∨							1								
orizon		SEP-	IRA (1)	401	1K (1)	IR	A (1)									
Year		Account	Income	Account	Income	Account	Income	Accounts	Planned	Wages	Pension	SS (2)	Total	Year		
real					-			Total	Distribution	(2)	(2)	33(2)	Income	Tear		
net return nitial amount	60	4.00 %	IRA	6.00 % 678,000	IRA	4.00 % 80,000	IRA	779,000	Subtotal							
bonus %		0.00 %		0.00 %		0.00 %		//9,000	of account	Infl Factor	Infl Factor	Infl Factor				
w/bonus		21,000		678,000		80,000		779,000	incomes	2.20 %	3.20 %	3.20 %				
end of 1	61	21,840	0	718,680	0	83,200	0	823,720	0	60,000	0	0	60,000	end of 1		
end of 2	62	22,714	0	761,801	0	86,528	0	871,042	0	61,320	0	0	61,320	end of 2		
end of 3	63	23,622	0	807,509	0	89,989	0	921,120	0	62,669	0	0	62,669	end of 3		
end of 4	64	24,567	0	855,959	0	93,589	0	974,115	0	64,048	0	0	64,048	end of 4		
end of 5	65 66	25,550 26,572	0	907,317	0	97,332	0	1,030,199	0	0	24,000	26,010 26,842	50,010	end of 5 end of 6		
end of 6 end of 7	67	26,572	0	961,756 1,019,461	0	101,226 105,275	0	1,089,553	0	0	24,768	26,842	51,610 53,262	end of 6 end of 7		
end of 8	68	28,740	0	1,080,628	0	109,486	0	1,218,854	0	0	26,379	28,588	54,966	end of 8		
end of 9	69	29,890	0	1,145,466	0	113,865	0	1,289,220	0	0	27,223	29,503	56,725	end of 9		
end of 10	70	31,085	0	1,214,194	0	118,420	0	1,363,699	0	0	28,094	30,447	58,540	end of 10		
end of 11	71	32,329	0	1,287,046	0	123,156	0	1,442,530	0	0	28,993	31,421	60,414	end of 11		
end of 12	72	33,622	0	1,364,268	0	128,083	0	1,525,972	0	0	29,921	32,426	62,347	end of 12		
end of 13	73	34,967	0	1,446,124	0	133,206	0	1,614,297	0	0	30,878	33,464	64,342	end of 13		
end of 14	74	36,365	0	1,532,892	0	138,534	0	1,707,791	0	0	31,866	34,535	66,401	end of 14		
end of 15	75	37,820	0	1,624,865	0	144,075	0	1,806,760	0	0	32,886	35,640	68,526	end of 15		
end of 16	76	39,333	0	1,722,357	0	149,838	0	1,911,528	0	0	33,938	36,780	70,719	end of 16		
	ackgrounds in		0		0		0		0	248,037	344,505	373,357	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.