

# Replicate a Current Scenario As

09/17/2024 1:33 pm EDT

Within the structured income plan you can replicate and rename a current scenario to a unique title. Below is a step-by-step guide for replicating and renaming a current scenario.

Step 1: Edit: Click on the green Edit 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 Dynamic Mode

Scenario: New Scenario

Planning Horizon: 16 years

| Year            | Savings (3) |        | ROTH IRA (3) |         | 401K (3) |           | BNFL IRA (3) |           | Accounts Total | Planned Distribution | Wages (4) | SS        | Pension (4) | Total Income | Year      |
|-----------------|-------------|--------|--------------|---------|----------|-----------|--------------|-----------|----------------|----------------------|-----------|-----------|-------------|--------------|-----------|
|                 | Account     | Income | Account      | Income  | Account  | Income    | Account      | Income    |                |                      |           |           |             |              |           |
| net return      | 55          | 1.00 % | 4.00 %       | 6.00 %  | 6.00 %   | 6.00 %    | IRA          | 6.00 %    | bIRA           | 1,660,000            | 0         | 1,660,000 | 0           | 0            | 0         |
| initial amount  | 30,000      | 0.00 % | 100,000      | 0.00 %  | 630,000  | 0.00 %    | 900,000      | 0.00 %    | 900,000        | 1,660,000            | 0         | 1,660,000 | 0           | 0            | 0         |
| bonus % w/bonus | 30,000      | 0.00 % | 100,000      | 0.00 %  | 630,000  | 0.00 %    | 900,000      | 0.00 %    | 900,000        | 1,660,000            | 0         | 1,660,000 | 0           | 0            | 0         |
| end of 1        | 56          | 30,300 | 0            | 104,000 | 0        | 667,800   | 0            | 954,000   | 0              | 1,756,100            | 0         | 150,000   | 0           | 0            | 150,000   |
| end of 2        | 57          | 30,603 | 0            | 108,160 | 0        | 707,868   | 0            | 1,011,240 | 0              | 1,857,871            | 0         | 153,300   | 0           | 0            | 153,300   |
| end of 3        | 58          | 30,909 | 0            | 112,486 | 0        | 750,340   | 0            | 1,071,914 | 0              | 1,965,650            | 0         | 156,673   | 0           | 0            | 156,673   |
| end of 4        | 59          | 31,218 | 0            | 116,986 | 0        | 795,360   | 0            | 1,136,229 | 0              | 2,079,793            | 0         | 160,119   | 0           | 0            | 160,119   |
| end of 5        | 60          | 31,530 | 0            | 121,665 | 0        | 843,082   | 0            | 1,204,403 | 0              | 2,200,680            | 0         | 163,642   | 0           | 0            | 163,642   |
| end of 6        | 61          | 31,846 | 0            | 126,532 | 0        | 893,667   | 0            | 1,276,667 | 0              | 2,328,711            | 0         | 167,242   | 0           | 0            | 167,242   |
| end of 7        | 62          | 32,164 | 0            | 131,593 | 0        | 947,287   | 0            | 1,353,267 | 0              | 2,464,310            | 0         | 170,921   | 0           | 0            | 170,921   |
| end of 8        | 63          | 32,486 | 0            | 136,857 | 0        | 1,004,124 | 0            | 1,434,462 | 0              | 2,607,929            | 0         | 174,682   | 0           | 0            | 174,682   |
| end of 9        | 64          | 32,811 | 0            | 142,331 | 0        | 1,064,371 | 0            | 1,520,530 | 0              | 2,760,043            | 0         | 178,525   | 0           | 0            | 178,525   |
| end of 10       | 65          | 33,139 | 0            | 148,024 | 0        | 1,128,233 | 0            | 1,611,762 | 0              | 2,921,158            | 0         | 182,462   | 22,542      | 30,000       | 214,964   |
| end of 11       | 66          | 33,470 | 0            | 153,945 | 0        | 1,195,927 | 0            | 1,708,468 | 0              | 3,091,810            | 0         | 186,495   | 23,263      | 30,960       | 240,718   |
| end of 12       | 67          | 33,805 | 0            | 160,103 | 0        | 1,267,683 | 0            | 1,810,976 | 0              | 3,272,566            | 0         | 190,628   | 24,008      | 31,951       | 246,587   |
| end of 13       | 68          | 34,143 | 0            | 166,507 | 0        | 1,343,744 | 0            | 1,919,654 | 0              | 3,464,028            | 0         | 194,967   | 24,776      | 32,973       | 252,716   |
| end of 14       | 69          | 34,484 | 0            | 173,168 | 0        | 1,424,368 | 0            | 2,034,812 | 0              | 3,666,832            | 0         | 200,000   | 25,569      | 34,028       | 260,597   |
| end of 15       | 70          | 34,829 | 0            | 180,094 | 0        | 1,509,830 | 0            | 2,156,900 | 0              | 3,881,654            | 0         | 205,929   | 26,387      | 35,117       | 271,433   |
| end of 16       | 71          | 35,177 | 0            | 187,298 | 0        | 1,600,420 | 0            | 2,286,314 | 0              | 4,109,210            | 0         | 212,362   | 27,231      | 36,241       | 285,834   |
|                 |             |        | 0            |         | 0        |           | 0            |           | 0              |                      | 0         | 1,475,104 | 173,776     | 231,270      | 1,880,151 |

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY 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.

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 **Replicate Current Scenario As**

Scenario: New Scenario

Planning Horizon: 16 years

| Year            | Savings (3) |        | ROTH IRA (3) |         | 401K (3) |           | BNFL IRA (3) |           | Accounts Total | Planned Distribution        | Wages (4) |         |         | SS     | Pension (4) | Total Income | Year |
|-----------------|-------------|--------|--------------|---------|----------|-----------|--------------|-----------|----------------|-----------------------------|-----------|---------|---------|--------|-------------|--------------|------|
|                 | Account     | Income | Account      | Income  | Account  | Income    | Account      | Income    |                |                             | Manage    | Manage  | Manage  |        |             |              |      |
| net return      | 55          | 1.00 % |              | 4.00 %  |          | 6.00 %    |              | 6.00 %    |                |                             |           |         |         |        |             |              |      |
| initial amount  |             | 30,000 |              | 100,000 |          | 630,000   |              | 900,000   | 1,660,000      | Subtotal of account incomes | 1,660,000 | 0       | 0       | 0      | 0           | 0            | 0    |
| bonus % w/bonus |             | 0.00 % |              | 0.00 %  |          | 0.00 %    |              | 0.00 %    | 0              |                             | 0         | 0       | 0       | 0      | 0           | 0            | 0    |
|                 |             | 30,000 | Manage       | 100,000 | Manage   | 630,000   | Manage       | 900,000   | 1,660,000      |                             | 1,660,000 | 2.20 %  | 3.20 %  | 3.20 % |             |              |      |
| end of 1        | 56          | 30,300 | 0            | 104,000 | 0        | 667,800   | 0            | 954,000   | 1,756,100      | 0                           | 150,000   | 0       | 0       | 0      | 150,000     | end of 1     |      |
| end of 2        | 57          | 30,603 | 0            | 108,160 | 0        | 707,868   | 0            | 1,011,240 | 1,857,871      | 0                           | 153,300   | 0       | 0       | 0      | 153,300     | end of 2     |      |
| end of 3        | 58          | 30,909 | 0            | 112,486 | 0        | 750,340   | 0            | 1,071,914 | 1,965,650      | 0                           | 156,673   | 0       | 0       | 0      | 156,673     | end of 3     |      |
| end of 4        | 59          | 31,218 | 0            | 116,986 | 0        | 795,360   | 0            | 1,136,229 | 2,079,793      | 0                           | 160,119   | 0       | 0       | 0      | 160,119     | end of 4     |      |
| end of 5        | 60          | 31,530 | 0            | 121,665 | 0        | 843,082   | 0            | 1,204,403 | 2,200,680      | 0                           | 163,642   | 0       | 0       | 0      | 163,642     | end of 5     |      |
| end of 6        | 61          | 31,846 | 0            | 126,532 | 0        | 893,667   | 0            | 1,276,667 | 2,328,711      | 0                           | 167,242   | 0       | 0       | 0      | 167,242     | end of 6     |      |
| end of 7        | 62          | 32,164 | 0            | 131,993 | 0        | 947,287   | 0            | 1,353,267 | 2,464,310      | 0                           | 170,921   | 0       | 0       | 0      | 170,921     | end of 7     |      |
| end of 8        | 63          | 32,486 | 0            | 136,857 | 0        | 1,004,124 | 0            | 1,434,462 | 2,607,929      | 0                           | 174,682   | 0       | 0       | 0      | 174,682     | end of 8     |      |
| end of 9        | 64          | 32,811 | 0            | 142,331 | 0        | 1,064,371 | 0            | 1,520,530 | 2,760,943      | 0                           | 178,525   | 0       | 0       | 0      | 178,525     | end of 9     |      |
| end of 10       | 65          | 33,139 | 0            | 148,024 | 0        | 1,128,233 | 0            | 1,611,762 | 2,921,158      | 0                           | 0         | 22,542  | 30,000  | 0      | 52,542      | end of 10    |      |
| end of 11       | 66          | 33,470 | 0            | 153,945 | 0        | 1,195,927 | 0            | 1,708,468 | 3,091,810      | 0                           | 0         | 23,263  | 30,960  | 54,223 | 54,223      | end of 11    |      |
| end of 12       | 67          | 33,805 | 0            | 160,103 | 0        | 1,267,683 | 0            | 1,810,976 | 3,272,566      | 0                           | 0         | 24,008  | 31,951  | 55,958 | 55,958      | end of 12    |      |
| end of 13       | 68          | 34,143 | 0            | 166,507 | 0        | 1,343,744 | 0            | 1,919,634 | 3,464,028      | 0                           | 0         | 24,776  | 32,973  | 57,749 | 57,749      | end of 13    |      |
| end of 14       | 69          | 34,484 | 0            | 173,168 | 0        | 1,424,368 | 0            | 2,034,812 | 3,666,832      | 0                           | 0         | 25,569  | 34,028  | 59,597 | 59,597      | end of 14    |      |
| end of 15       | 70          | 34,829 | 0            | 180,094 | 0        | 1,509,830 | 0            | 2,156,900 | 3,881,654      | 0                           | 0         | 26,387  | 35,117  | 61,504 | 61,504      | end of 15    |      |
| end of 16       | 71          | 35,177 | 0            | 187,298 | 0        | 1,600,420 | 0            | 2,286,314 | 4,109,210      | 0                           | 0         | 27,231  | 36,241  | 63,472 | 63,472      | end of 16    |      |
|                 |             |        | 0            |         | 0        |           | 0            |           |                |                             | 1,475,104 | 173,776 | 231,270 |        | 1,880,151   |              |      |

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 3: Replicate Current Scenario As: Click in the text box next to the green button titled replicate current scenario as.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Scenario

Save Cancel

Scenario: New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

**Replicate Current Scenario As ...**

Accounts Also Used In

- Savings (3) [Replicate] [Remove]
- ROTH IRA (3) [Replicate] [Remove]
- 401K (3) [Replicate] [Remove]
- BNFL IRA (3) [Replicate] [Remove]

Add Account Common Replicate New

Incomes Also Used In

- Wages (4) [Replicate] [Remove]
- SS (4) [Replicate] [Remove]
- Pension (4) [Replicate] [Remove]

Add Income Common Replicate New

Target Also Used In

Add Target Common Replicate New

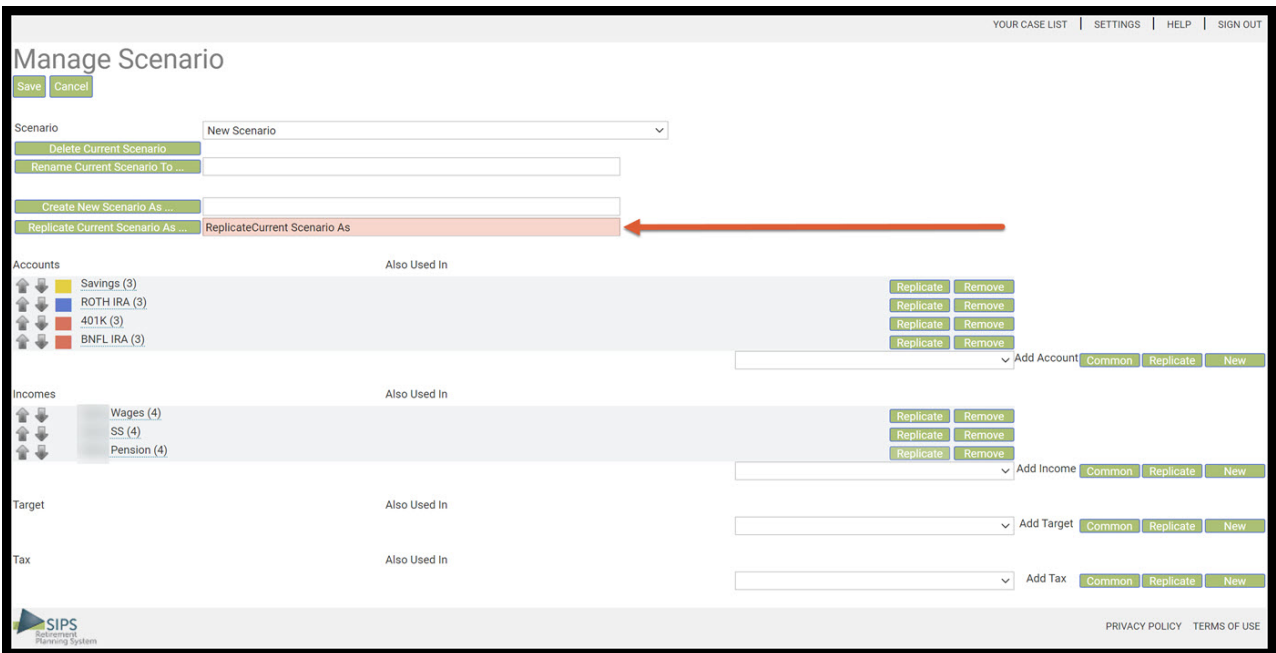
Tax Also Used In

Add Tax Common Replicate New

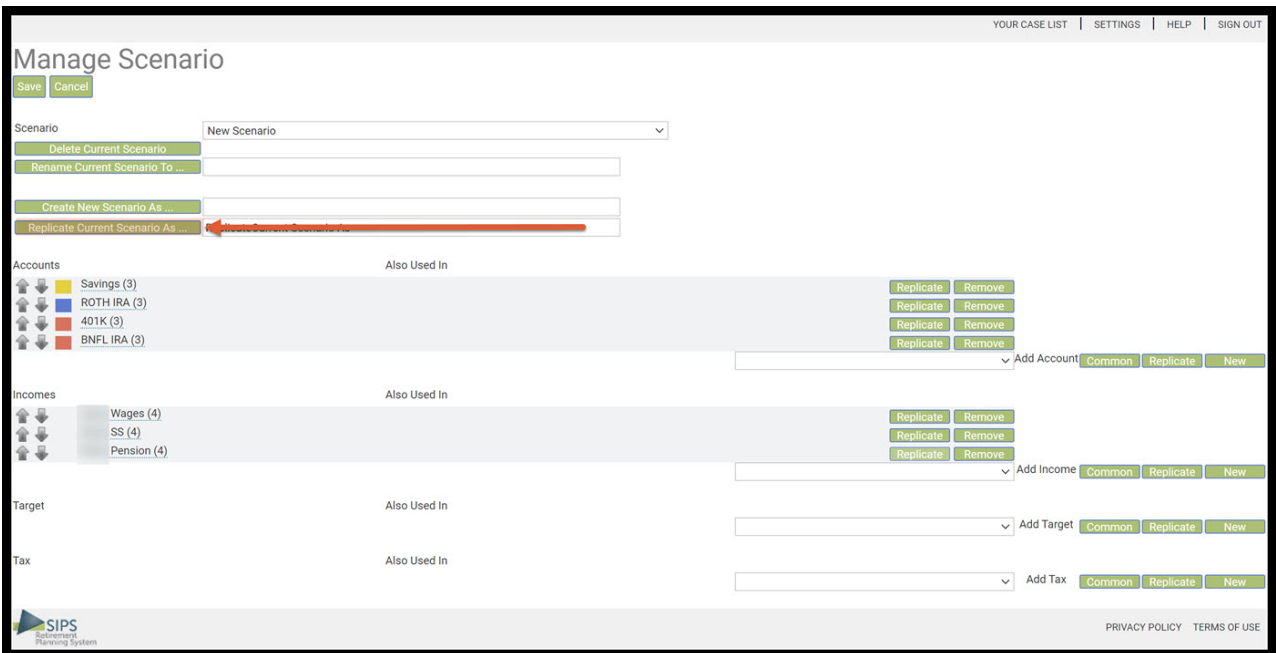
SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

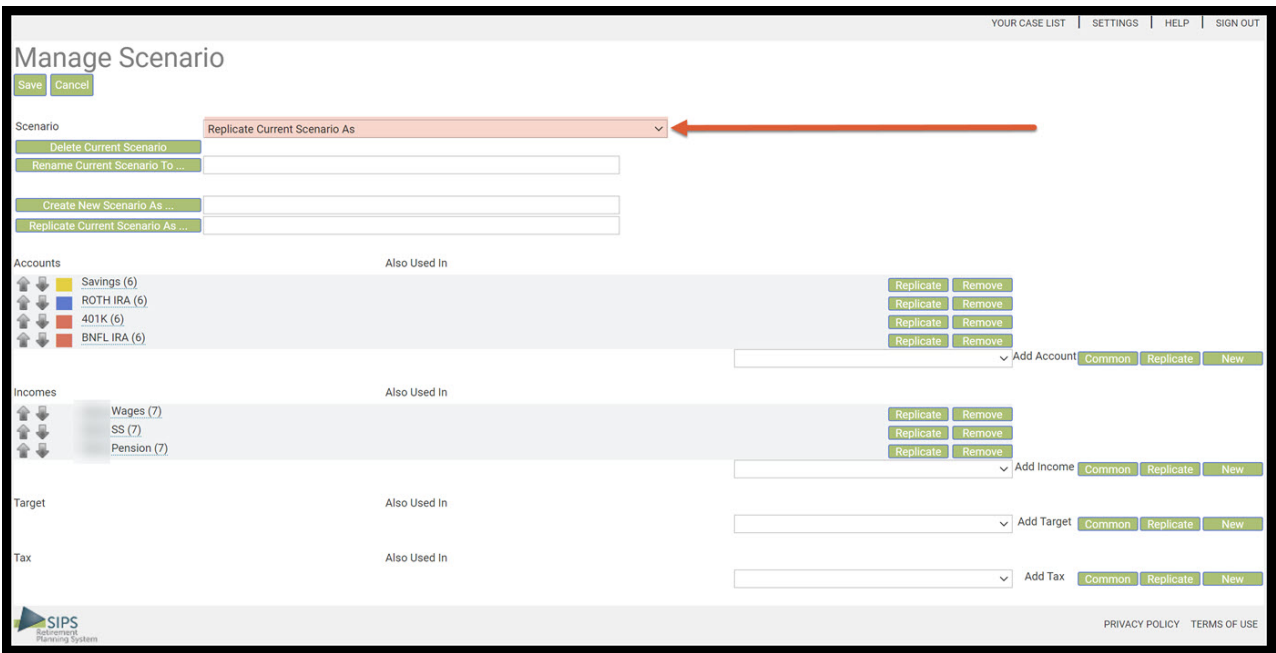
Step 4: Edit the Text Box: Delete default name and type in the new title for the current scenario.



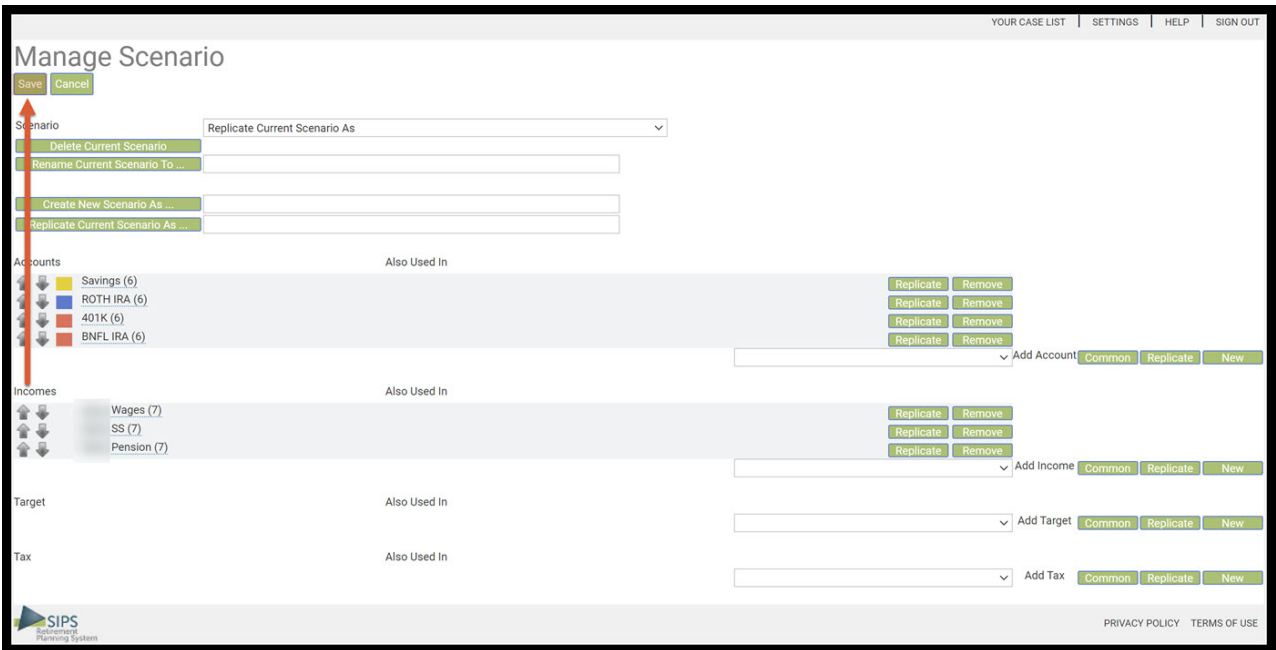
Step 5: Clicking: Double click on the green Replicate Current Scenario As button located next to the text box.



Step 6: Scenario Text Box: The current scenario name should be replaced over the old name in the scenario text box.



Step 7: Save: Click on the green save button underneath the manage scenario subheading.



Step 8: Structured Income Plan Scenario: In the text box the new current title should be reflected.

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: Replicate Current Scenario As

Planning Horizon: 16 years

| Year             | Savings (6) |        | ROTH IRA (6) |         | 401K (6) |           | BNFL IRA (6) |           | Accounts Total | Planned Distribution | Wages (7) | SS        | Pension (7) | Total Income | Year      |
|------------------|-------------|--------|--------------|---------|----------|-----------|--------------|-----------|----------------|----------------------|-----------|-----------|-------------|--------------|-----------|
|                  | Account     | Income | Account      | Income  | Account  | Income    | Account      | Income    |                |                      |           |           |             |              |           |
| net return       | 55          | 1.00 % |              | 4.00 %  |          | 6.00 %    | IRA          | 6.00 %    | bIRA           | 1,660,000            | 0         | 0         | 0           | 0            |           |
| initial amount   |             | 30,000 |              | 100,000 |          | 630,000   |              | 900,000   |                | 1,660,000            | 0         | 0         | 0           | 0            |           |
| bonus % w/ bonus |             | 0.00 % |              | 0.00 %  |          | 0.00 %    |              | 0.00 %    |                | 0                    | 0         | 0         | 0           | 0            |           |
| end of 1         | 56          | 30,300 | 0            | 104,000 | 0        | 667,800   | 0            | 954,000   | 0              | 1,756,100            | 0         | 0         | 0           | 150,000      | end of 1  |
| end of 2         | 57          | 30,603 | 0            | 108,160 | 0        | 707,868   | 0            | 1,011,240 | 0              | 1,857,871            | 0         | 0         | 0           | 153,300      | end of 2  |
| end of 3         | 58          | 30,909 | 0            | 112,486 | 0        | 750,340   | 0            | 1,071,914 | 0              | 1,965,650            | 0         | 0         | 0           | 156,673      | end of 3  |
| end of 4         | 59          | 31,218 | 0            | 116,986 | 0        | 795,360   | 0            | 1,136,229 | 0              | 2,079,793            | 0         | 0         | 0           | 160,119      | end of 4  |
| end of 5         | 60          | 31,530 | 0            | 121,665 | 0        | 843,082   | 0            | 1,204,403 | 0              | 2,200,680            | 0         | 0         | 0           | 163,642      | end of 5  |
| end of 6         | 61          | 31,846 | 0            | 126,532 | 0        | 893,667   | 0            | 1,276,667 | 0              | 2,328,711            | 0         | 0         | 0           | 167,242      | end of 6  |
| end of 7         | 62          | 32,164 | 0            | 131,593 | 0        | 947,287   | 0            | 1,353,267 | 0              | 2,464,310            | 0         | 0         | 0           | 170,921      | end of 7  |
| end of 8         | 63          | 32,486 | 0            | 136,857 | 0        | 1,004,124 | 0            | 1,434,462 | 0              | 2,607,929            | 0         | 0         | 0           | 174,682      | end of 8  |
| end of 9         | 64          | 32,811 | 0            | 142,331 | 0        | 1,064,371 | 0            | 1,520,530 | 0              | 2,760,043            | 0         | 0         | 0           | 178,525      | end of 9  |
| end of 10        | 65          | 33,139 | 0            | 148,024 | 0        | 1,128,233 | 0            | 1,611,762 | 0              | 2,921,158            | 0         | 0         | 22,542      | 30,000       | 52,542    |
| end of 11        | 66          | 33,470 | 0            | 153,945 | 0        | 1,195,927 | 0            | 1,708,468 | 0              | 3,091,810            | 0         | 0         | 23,263      | 30,960       | 54,223    |
| end of 12        | 67          | 33,805 | 0            | 160,103 | 0        | 1,267,683 | 0            | 1,810,976 | 0              | 3,272,566            | 0         | 0         | 24,008      | 31,951       | 55,958    |
| end of 13        | 68          | 34,143 | 0            | 166,507 | 0        | 1,343,744 | 0            | 1,919,634 | 0              | 3,464,028            | 0         | 0         | 24,776      | 32,973       | 57,749    |
| end of 14        | 69          | 34,484 | 0            | 173,168 | 0        | 1,424,368 | 0            | 2,034,812 | 0              | 3,666,832            | 0         | 0         | 25,569      | 34,028       | 59,597    |
| end of 15        | 70          | 34,829 | 0            | 180,094 | 0        | 1,509,830 | 0            | 2,156,900 | 0              | 3,881,654            | 0         | 0         | 26,387      | 35,117       | 61,504    |
| end of 16        | 71          | 35,177 | 0            | 187,298 | 0        | 1,600,420 | 0            | 2,286,314 | 0              | 4,109,210            | 0         | 0         | 27,231      | 36,241       | 63,472    |
|                  |             |        | 0            |         | 0        |           | 0            |           | 0              |                      | 0         | 1,475,104 | 173,776     | 231,270      | 1,880,151 |

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 9: 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: Replicate Current Scenario As

Planning Horizon: 16 years

| Year             | Savings (6) |        | ROTH IRA (6) |         | 401K (6) |           | BNFL IRA (6) |           | Accounts Total | Planned Distribution | Wages (7) | SS        | Pension (7) | Total Income | Year      |
|------------------|-------------|--------|--------------|---------|----------|-----------|--------------|-----------|----------------|----------------------|-----------|-----------|-------------|--------------|-----------|
|                  | Account     | Income | Account      | Income  | Account  | Income    | Account      | Income    |                |                      |           |           |             |              |           |
| net return       | 55          | 1.00 % |              | 4.00 %  |          | 6.00 %    | IRA          | 6.00 %    | bIRA           | 1,660,000            | 0         | 0         | 0           | 0            |           |
| initial amount   |             | 30,000 |              | 100,000 |          | 630,000   |              | 900,000   |                | 1,660,000            | 0         | 0         | 0           | 0            |           |
| bonus % w/ bonus |             | 0.00 % |              | 0.00 %  |          | 0.00 %    |              | 0.00 %    |                | 0                    | 0         | 0         | 0           | 0            |           |
| end of 1         | 56          | 30,300 | 0            | 104,000 | 0        | 667,800   | 0            | 954,000   | 0              | 1,756,100            | 0         | 0         | 0           | 150,000      | end of 1  |
| end of 2         | 57          | 30,603 | 0            | 108,160 | 0        | 707,868   | 0            | 1,011,240 | 0              | 1,857,871            | 0         | 0         | 0           | 153,300      | end of 2  |
| end of 3         | 58          | 30,909 | 0            | 112,486 | 0        | 750,340   | 0            | 1,071,914 | 0              | 1,965,650            | 0         | 0         | 0           | 156,673      | end of 3  |
| end of 4         | 59          | 31,218 | 0            | 116,986 | 0        | 795,360   | 0            | 1,136,229 | 0              | 2,079,793            | 0         | 0         | 0           | 160,119      | end of 4  |
| end of 5         | 60          | 31,530 | 0            | 121,665 | 0        | 843,082   | 0            | 1,204,403 | 0              | 2,200,680            | 0         | 0         | 0           | 163,642      | end of 5  |
| end of 6         | 61          | 31,846 | 0            | 126,532 | 0        | 893,667   | 0            | 1,276,667 | 0              | 2,328,711            | 0         | 0         | 0           | 167,242      | end of 6  |
| end of 7         | 62          | 32,164 | 0            | 131,593 | 0        | 947,287   | 0            | 1,353,267 | 0              | 2,464,310            | 0         | 0         | 0           | 170,921      | end of 7  |
| end of 8         | 63          | 32,486 | 0            | 136,857 | 0        | 1,004,124 | 0            | 1,434,462 | 0              | 2,607,929            | 0         | 0         | 0           | 174,682      | end of 8  |
| end of 9         | 64          | 32,811 | 0            | 142,331 | 0        | 1,064,371 | 0            | 1,520,530 | 0              | 2,760,043            | 0         | 0         | 0           | 178,525      | end of 9  |
| end of 10        | 65          | 33,139 | 0            | 148,024 | 0        | 1,128,233 | 0            | 1,611,762 | 0              | 2,921,158            | 0         | 0         | 22,542      | 30,000       | 52,542    |
| end of 11        | 66          | 33,470 | 0            | 153,945 | 0        | 1,195,927 | 0            | 1,708,468 | 0              | 3,091,810            | 0         | 0         | 23,263      | 30,960       | 54,223    |
| end of 12        | 67          | 33,805 | 0            | 160,103 | 0        | 1,267,683 | 0            | 1,810,976 | 0              | 3,272,566            | 0         | 0         | 24,008      | 31,951       | 55,958    |
| end of 13        | 68          | 34,143 | 0            | 166,507 | 0        | 1,343,744 | 0            | 1,919,634 | 0              | 3,464,028            | 0         | 0         | 24,776      | 32,973       | 57,749    |
| end of 14        | 69          | 34,484 | 0            | 173,168 | 0        | 1,424,368 | 0            | 2,034,812 | 0              | 3,666,832            | 0         | 0         | 25,569      | 34,028       | 59,597    |
| end of 15        | 70          | 34,829 | 0            | 180,094 | 0        | 1,509,830 | 0            | 2,156,900 | 0              | 3,881,654            | 0         | 0         | 26,387      | 35,117       | 61,504    |
| end of 16        | 71          | 35,177 | 0            | 187,298 | 0        | 1,600,420 | 0            | 2,286,314 | 0              | 4,109,210            | 0         | 0         | 27,231      | 36,241       | 63,472    |
|                  |             |        | 0            |         | 0        |           | 0            |           | 0              |                      | 0         | 1,475,104 | 173,776     | 231,270      | 1,880,151 |

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 10: 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:

| Year            | Savings (6) |        | ROTH IRA (6) |         | 401K (6) |           | BNFL IRA (6) |           | Accounts Total | Planned Distribution | Wages (7)                   | SS          | Pension (7) | Total Income | Year      |           |
|-----------------|-------------|--------|--------------|---------|----------|-----------|--------------|-----------|----------------|----------------------|-----------------------------|-------------|-------------|--------------|-----------|-----------|
|                 | Account     | Income | Account      | Income  | Account  | Income    | Account      | Income    |                |                      |                             |             |             |              |           |           |
| net return      | 55          | 1.00 % |              | 4.00 %  |          | 6.00 %    | IRA          | 6.00 %    | bIRA           | 1,660,000            |                             |             |             |              |           |           |
| initial amount  |             | 30,000 |              | 100,000 |          | 630,000   |              | 900,000   |                | 0                    | Subtotal of account incomes | Infl Factor | Infl Factor | Infl Factor  |           |           |
| bonus % w/bonus |             | 0.00 % |              | 0.00 %  |          | 0.00 %    |              | 0.00 %    |                | 1,660,000            |                             | 2.20 %      | 3.20 %      | 3.20 %       |           |           |
| end of 1        | 56          | 30,300 | 0            | 104,000 | 0        | 667,800   | 0            | 954,000   | 0              | 1,756,100            | 0                           | 150,000     | 0           | 0            | 150,000   | end of 1  |
| end of 2        | 57          | 30,603 | 0            | 108,160 | 0        | 707,868   | 0            | 1,011,240 | 0              | 1,857,871            | 0                           | 153,300     | 0           | 0            | 153,300   | end of 2  |
| end of 3        | 58          | 30,909 | 0            | 112,486 | 0        | 750,340   | 0            | 1,071,914 | 0              | 1,965,650            | 0                           | 156,673     | 0           | 0            | 156,673   | end of 3  |
| end of 4        | 59          | 31,218 | 0            | 116,986 | 0        | 795,360   | 0            | 1,136,229 | 0              | 2,079,793            | 0                           | 160,119     | 0           | 0            | 160,119   | end of 4  |
| end of 5        | 60          | 31,530 | 0            | 121,665 | 0        | 843,082   | 0            | 1,204,403 | 0              | 2,200,680            | 0                           | 163,642     | 0           | 0            | 163,642   | end of 5  |
| end of 6        | 61          | 31,846 | 0            | 126,532 | 0        | 893,667   | 0            | 1,276,667 | 0              | 2,328,711            | 0                           | 167,242     | 0           | 0            | 167,242   | end of 6  |
| end of 7        | 62          | 32,164 | 0            | 131,593 | 0        | 947,287   | 0            | 1,353,267 | 0              | 2,464,310            | 0                           | 170,921     | 0           | 0            | 170,921   | end of 7  |
| end of 8        | 63          | 32,486 | 0            | 136,857 | 0        | 1,004,124 | 0            | 1,434,462 | 0              | 2,607,929            | 0                           | 174,682     | 0           | 0            | 174,682   | end of 8  |
| end of 9        | 64          | 32,811 | 0            | 142,331 | 0        | 1,064,371 | 0            | 1,520,530 | 0              | 2,760,043            | 0                           | 178,525     | 0           | 0            | 178,525   | end of 9  |
| end of 10       | 65          | 33,139 | 0            | 148,024 | 0        | 1,128,233 | 0            | 1,611,762 | 0              | 2,921,158            | 0                           | 0           | 22,542      | 30,000       | 52,542    | end of 10 |
| end of 11       | 66          | 33,470 | 0            | 153,945 | 0        | 1,195,927 | 0            | 1,708,468 | 0              | 3,091,810            | 0                           | 0           | 23,263      | 30,960       | 54,223    | end of 11 |
| end of 12       | 67          | 33,805 | 0            | 160,103 | 0        | 1,267,683 | 0            | 1,810,976 | 0              | 3,272,566            | 0                           | 0           | 24,008      | 31,951       | 55,958    | end of 12 |
| end of 13       | 68          | 34,143 | 0            | 166,507 | 0        | 1,343,744 | 0            | 1,919,634 | 0              | 3,464,028            | 0                           | 0           | 24,776      | 32,973       | 57,749    | end of 13 |
| end of 14       | 69          | 34,484 | 0            | 173,168 | 0        | 1,424,368 | 0            | 2,034,812 | 0              | 3,666,832            | 0                           | 0           | 25,569      | 34,028       | 59,597    | end of 14 |
| end of 15       | 70          | 34,829 | 0            | 180,094 | 0        | 1,509,830 | 0            | 2,156,900 | 0              | 3,881,654            | 0                           | 0           | 26,387      | 35,117       | 61,504    | end of 15 |
| end of 16       | 71          | 35,177 | 0            | 187,298 | 0        | 1,600,420 | 0            | 2,286,314 | 0              | 4,109,210            | 0                           | 0           | 27,231      | 36,241       | 63,472    | end of 16 |
|                 |             |        | 0            |         | 0        |           | 0            |           | 0              |                      | 0                           | 1,475,104   | 173,776     | 231,270      | 1,880,151 |           |

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 11: 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 Inv Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

| Year            | Savings (6) |        | ROTH IRA (6) |         | 401K (6) |           | BNFL IRA (6) |           | Accounts Total | Planned Distribution | Wages (7)                   | SS        | Pension (7) | Total Income | Year      |           |
|-----------------|-------------|--------|--------------|---------|----------|-----------|--------------|-----------|----------------|----------------------|-----------------------------|-----------|-------------|--------------|-----------|-----------|
|                 | Account     | Income | Account      | Income  | Account  | Income    | Account      | Income    |                |                      |                             |           |             |              |           |           |
| net return      | 55          | 1.00 % |              | 4.00 %  |          | 6.00 %    | IRA          | 6.00 %    | bIRA           | 1,660,000            |                             |           |             |              |           |           |
| initial amount  |             | 30,000 |              | 100,000 |          | 630,000   |              | 900,000   |                | 0                    | Subtotal of account incomes | Manage    | Manage      | Manage       |           |           |
| bonus % w/bonus |             | 0.00 % |              | 0.00 %  |          | 0.00 %    |              | 0.00 %    |                | 1,660,000            |                             | 2.20 %    | 3.20 %      | 3.20 %       |           |           |
| end of 1        | 56          | 30,300 | 0            | 104,000 | 0        | 667,800   | 0            | 954,000   | 0              | 1,756,100            | 0                           | 150,000   | 0           | 0            | 150,000   | end of 1  |
| end of 2        | 57          | 30,603 | 0            | 108,160 | 0        | 707,868   | 0            | 1,011,240 | 0              | 1,857,871            | 0                           | 153,300   | 0           | 0            | 153,300   | end of 2  |
| end of 3        | 58          | 30,909 | 0            | 112,486 | 0        | 750,340   | 0            | 1,071,914 | 0              | 1,965,650            | 0                           | 156,673   | 0           | 0            | 156,673   | end of 3  |
| end of 4        | 59          | 31,218 | 0            | 116,986 | 0        | 795,360   | 0            | 1,136,229 | 0              | 2,079,793            | 0                           | 160,119   | 0           | 0            | 160,119   | end of 4  |
| end of 5        | 60          | 31,530 | 0            | 121,665 | 0        | 843,082   | 0            | 1,204,403 | 0              | 2,200,680            | 0                           | 163,642   | 0           | 0            | 163,642   | end of 5  |
| end of 6        | 61          | 31,846 | 0            | 126,532 | 0        | 893,667   | 0            | 1,276,667 | 0              | 2,328,711            | 0                           | 167,242   | 0           | 0            | 167,242   | end of 6  |
| end of 7        | 62          | 32,164 | 0            | 131,593 | 0        | 947,287   | 0            | 1,353,267 | 0              | 2,464,310            | 0                           | 170,921   | 0           | 0            | 170,921   | end of 7  |
| end of 8        | 63          | 32,486 | 0            | 136,857 | 0        | 1,004,124 | 0            | 1,434,462 | 0              | 2,607,929            | 0                           | 174,682   | 0           | 0            | 174,682   | end of 8  |
| end of 9        | 64          | 32,811 | 0            | 142,331 | 0        | 1,064,371 | 0            | 1,520,530 | 0              | 2,760,043            | 0                           | 178,525   | 0           | 0            | 178,525   | end of 9  |
| end of 10       | 65          | 33,139 | 0            | 148,024 | 0        | 1,128,233 | 0            | 1,611,762 | 0              | 2,921,158            | 0                           | 0         | 22,542      | 30,000       | 52,542    | end of 10 |
| end of 11       | 66          | 33,470 | 0            | 153,945 | 0        | 1,195,927 | 0            | 1,708,468 | 0              | 3,091,810            | 0                           | 0         | 23,263      | 30,960       | 54,223    | end of 11 |
| end of 12       | 67          | 33,805 | 0            | 160,103 | 0        | 1,267,683 | 0            | 1,810,976 | 0              | 3,272,566            | 0                           | 0         | 24,008      | 31,951       | 55,958    | end of 12 |
| end of 13       | 68          | 34,143 | 0            | 166,507 | 0        | 1,343,744 | 0            | 1,919,634 | 0              | 3,464,028            | 0                           | 0         | 24,776      | 32,973       | 57,749    | end of 13 |
| end of 14       | 69          | 34,484 | 0            | 173,168 | 0        | 1,424,368 | 0            | 2,034,812 | 0              | 3,666,832            | 0                           | 0         | 25,569      | 34,028       | 59,597    | end of 14 |
| end of 15       | 70          | 34,829 | 0            | 180,094 | 0        | 1,509,830 | 0            | 2,156,900 | 0              | 3,881,654            | 0                           | 0         | 26,387      | 35,117       | 61,504    | end of 15 |
| end of 16       | 71          | 35,177 | 0            | 187,298 | 0        | 1,600,420 | 0            | 2,286,314 | 0              | 4,109,210            | 0                           | 0         | 27,231      | 36,241       | 63,472    | end of 16 |
|                 |             |        | 0            |         | 0        |           | 0            |           | 0              |                      | 0                           | 1,475,104 | 173,776     | 231,270      | 1,880,151 |           |

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 12: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

# Structured Income Planning

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

Scenario:

| Year            | Account | Income | Account | Income  | Account | Income    | Account | Income    | Accounts Total | Planned Distribution        | Wages (7)          | SS                 | Pension (7)        | Total Income | Year      |
|-----------------|---------|--------|---------|---------|---------|-----------|---------|-----------|----------------|-----------------------------|--------------------|--------------------|--------------------|--------------|-----------|
| net return      | 55      | 1.00 % | 4.00 %  | 6.00 %  | IRA     | 6.00 %    | bIRA    |           | 1,660,000      | Subtotal of account incomes | Infl Factor 2.20 % | Infl Factor 3.20 % | Infl Factor 3.20 % |              |           |
| initial amount  |         | 30,000 | 100,000 | 630,000 |         | 900,000   |         |           | 1,660,000      |                             |                    |                    |                    |              |           |
| bonus % w/bonus |         | 0.00 % | 0.00 %  | 0.00 %  |         | 0.00 %    |         |           | 1,660,000      |                             |                    |                    |                    |              |           |
| end of 1        | 56      | 30,300 | 0       | 104,000 | 0       | 667,800   | 0       | 954,000   | 0              | 1,756,100                   | 0                  | 150,000            | 0                  | 150,000      | end of 1  |
| end of 2        | 57      | 30,603 | 0       | 108,160 | 0       | 707,868   | 0       | 1,011,240 | 0              | 1,857,871                   | 0                  | 153,300            | 0                  | 153,300      | end of 2  |
| end of 3        | 58      | 30,909 | 0       | 112,486 | 0       | 750,340   | 0       | 1,071,914 | 0              | 1,965,650                   | 0                  | 156,673            | 0                  | 156,673      | end of 3  |
| end of 4        | 59      | 31,218 | 0       | 116,986 | 0       | 795,360   | 0       | 1,136,229 | 0              | 2,079,793                   | 0                  | 160,119            | 0                  | 160,119      | end of 4  |
| end of 5        | 60      | 31,530 | 0       | 121,665 | 0       | 843,082   | 0       | 1,204,403 | 0              | 2,200,680                   | 0                  | 163,642            | 0                  | 163,642      | end of 5  |
| end of 6        | 61      | 31,846 | 0       | 126,532 | 0       | 893,667   | 0       | 1,276,667 | 0              | 2,328,711                   | 0                  | 167,242            | 0                  | 167,242      | end of 6  |
| end of 7        | 62      | 32,164 | 0       | 131,593 | 0       | 947,287   | 0       | 1,353,267 | 0              | 2,464,310                   | 0                  | 170,921            | 0                  | 170,921      | end of 7  |
| end of 8        | 63      | 32,486 | 0       | 136,857 | 0       | 1,004,124 | 0       | 1,434,462 | 0              | 2,607,929                   | 0                  | 174,682            | 0                  | 174,682      | end of 8  |
| end of 9        | 64      | 32,811 | 0       | 142,331 | 0       | 1,064,371 | 0       | 1,520,530 | 0              | 2,760,043                   | 0                  | 178,525            | 0                  | 178,525      | end of 9  |
| end of 10       | 65      | 33,139 | 0       | 148,024 | 0       | 1,128,233 | 0       | 1,611,762 | 0              | 2,921,158                   | 0                  | 22,542             | 30,000             | 52,542       | end of 10 |
| end of 11       | 66      | 33,470 | 0       | 153,945 | 0       | 1,195,927 | 0       | 1,708,468 | 0              | 3,091,810                   | 0                  | 23,263             | 30,960             | 54,223       | end of 11 |
| end of 12       | 67      | 33,805 | 0       | 160,103 | 0       | 1,267,683 | 0       | 1,810,976 | 0              | 3,272,566                   | 0                  | 24,008             | 31,951             | 55,958       | end of 12 |
| end of 13       | 68      | 34,143 | 0       | 166,507 | 0       | 1,343,744 | 0       | 1,919,634 | 0              | 3,464,028                   | 0                  | 24,776             | 32,973             | 57,749       | end of 13 |
| end of 14       | 69      | 34,484 | 0       | 173,168 | 0       | 1,424,368 | 0       | 2,034,812 | 0              | 3,666,832                   | 0                  | 25,569             | 34,028             | 59,597       | end of 14 |
| end of 15       | 70      | 34,829 | 0       | 180,094 | 0       | 1,509,830 | 0       | 2,156,900 | 0              | 3,881,654                   | 0                  | 26,387             | 35,117             | 61,504       | end of 15 |
| end of 16       | 71      | 35,177 | 0       | 187,298 | 0       | 1,600,420 | 0       | 2,286,314 | 0              | 4,109,210                   | 0                  | 27,231             | 36,241             | 63,472       | end of 16 |
|                 |         | 0      | 0       | 0       | 0       | 0         | 0       | 0         | 0              | 0                           | 1,475,104          | 173,776            | 231,270            | 1,880,151    |           |

Orange backgrounds indicate hypothetical returns



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](mailto:support@planscout.com).