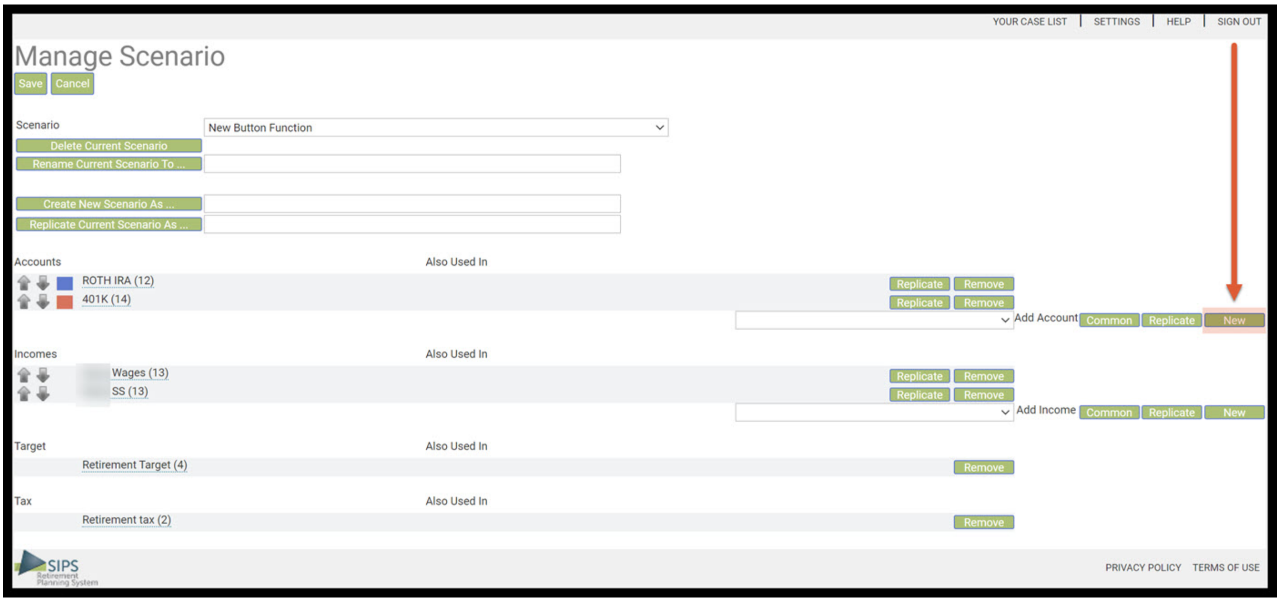
The New Button Function on the Manage Scenario Page

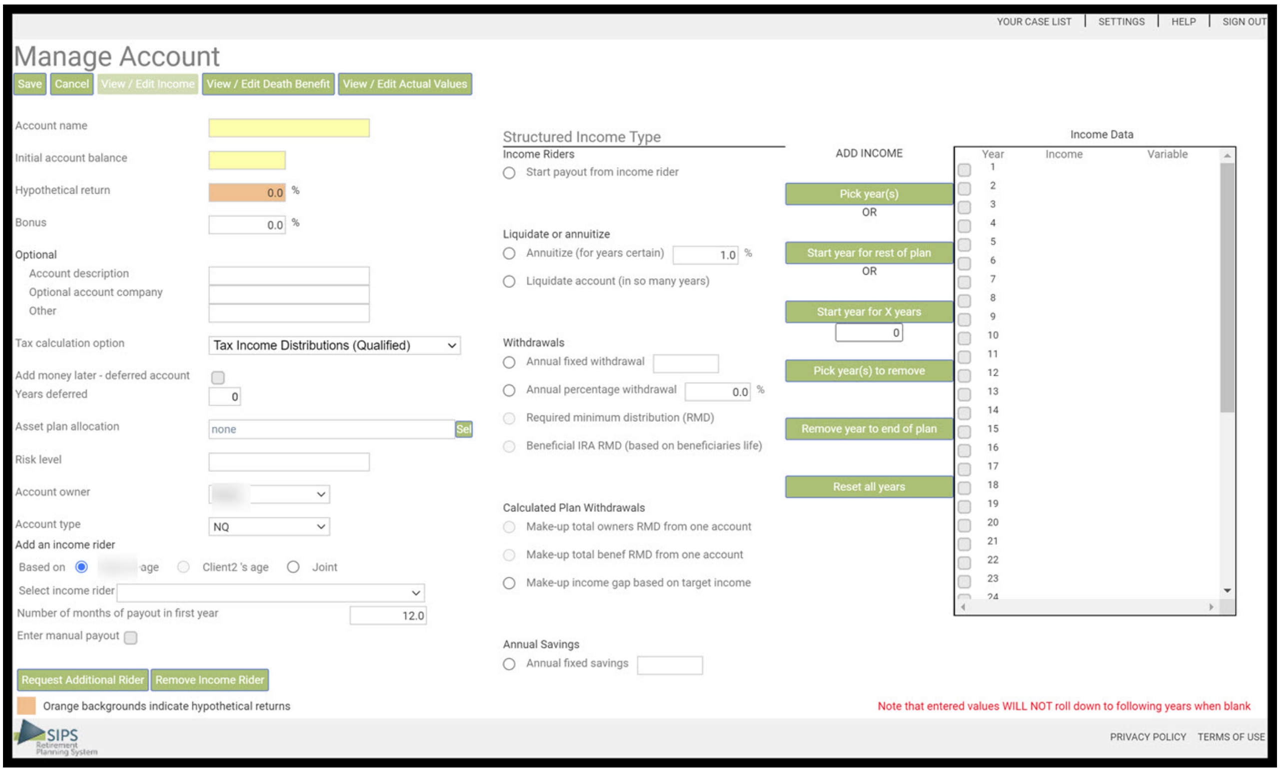
09/17/2024 1:42 pm EDT

Under the manage scenario page underneath the edit or add scenario subsection, you can add a new account and income into the structured income plan. Below are the step by step guidelines for adding an account and/or income from the manage scenario page.

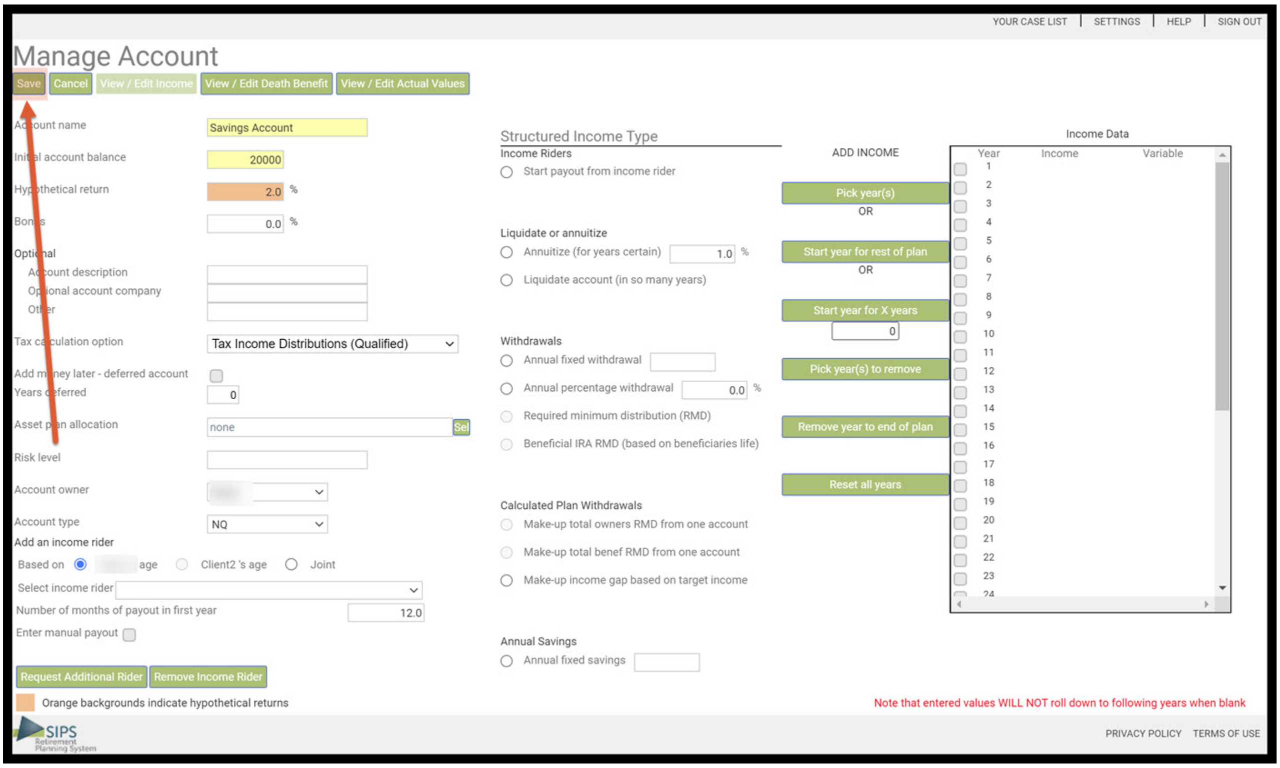
Adding an Account:
Step 1: New: Click on the green new button located at the right-hand side of the screen underneath the Accounts subsection.



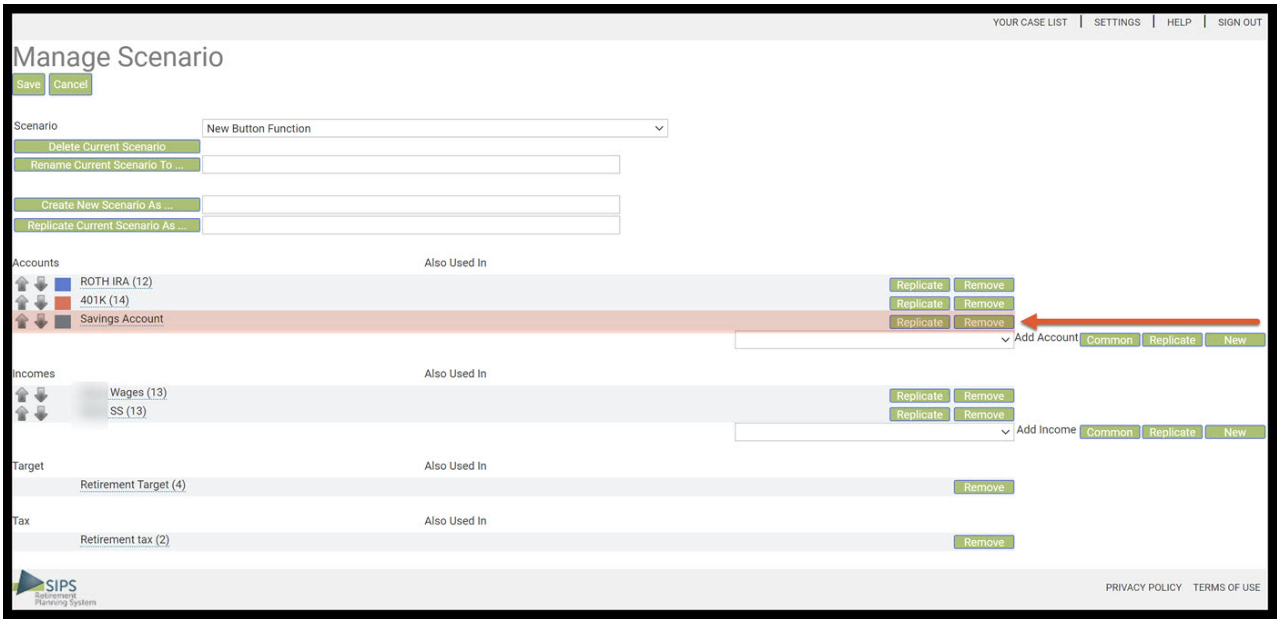
Step 2: Manage Account: Filter in the information for the new account.



Step 3: Save: Click on the green save button underneath the manage account subheading.

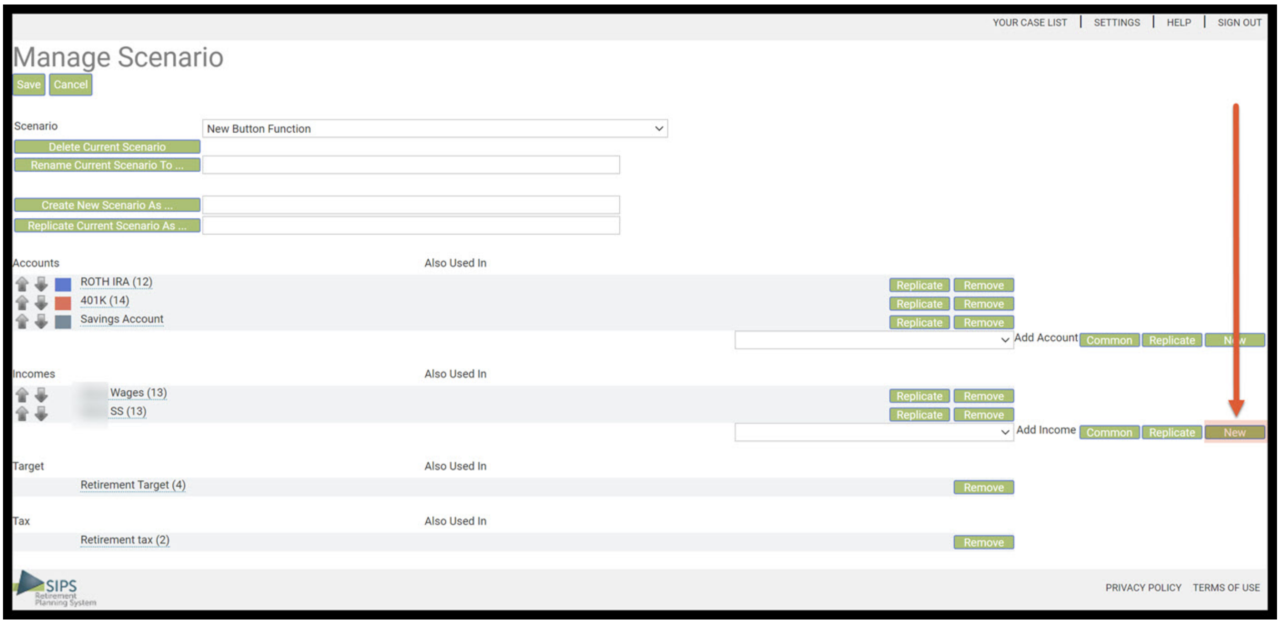


Step 4: Manage Scenario: The new account will be in the list underneath the account section.



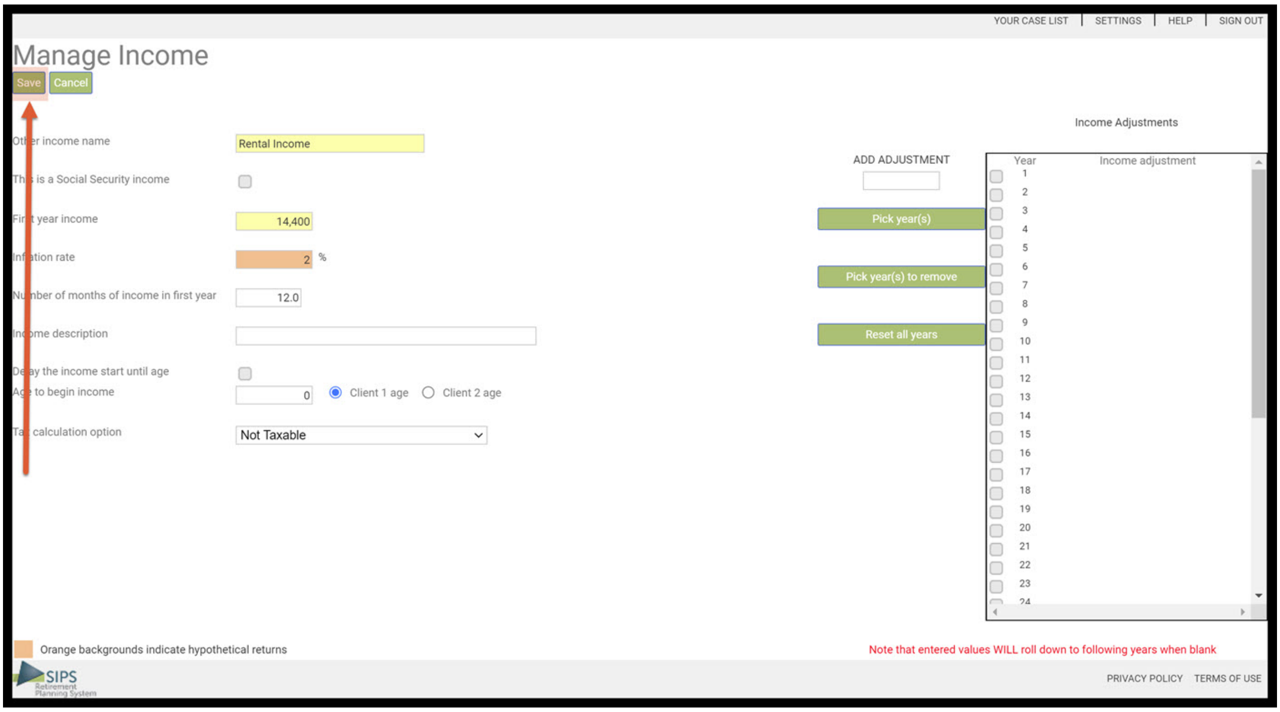
Adding an Income:

Step 5: New: Click on the green new button located at the right-hand side of the screen underneath the Incomes subsection.

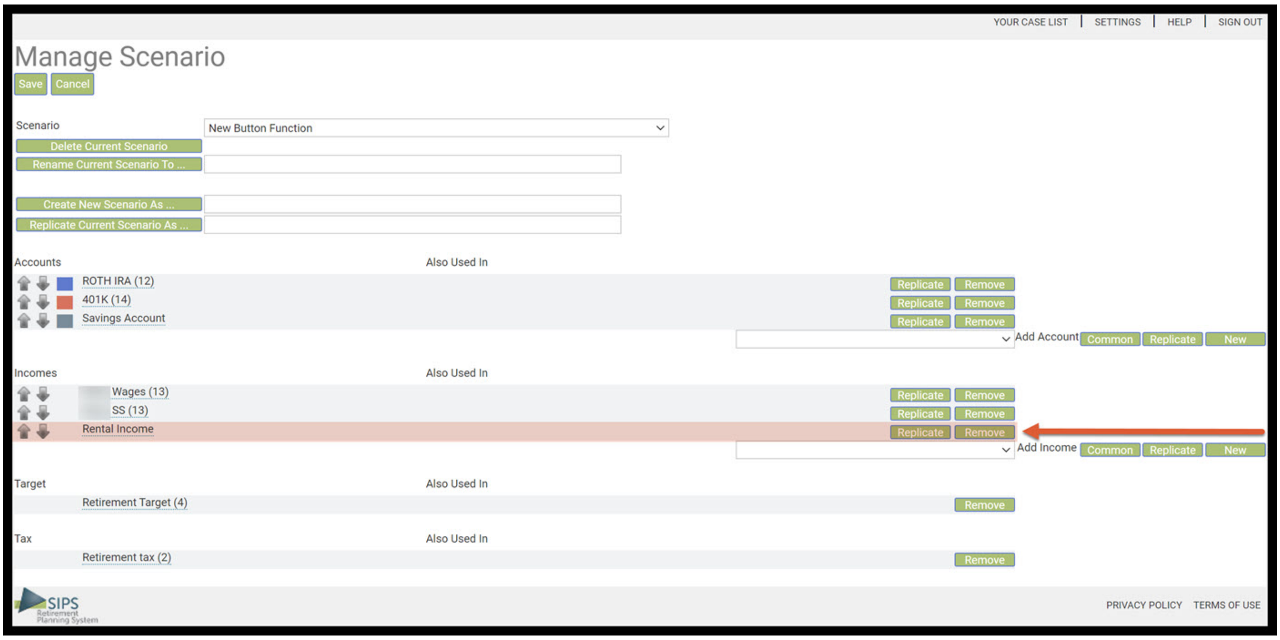


Step 6: Manage Income: Filter in the information for the new income.

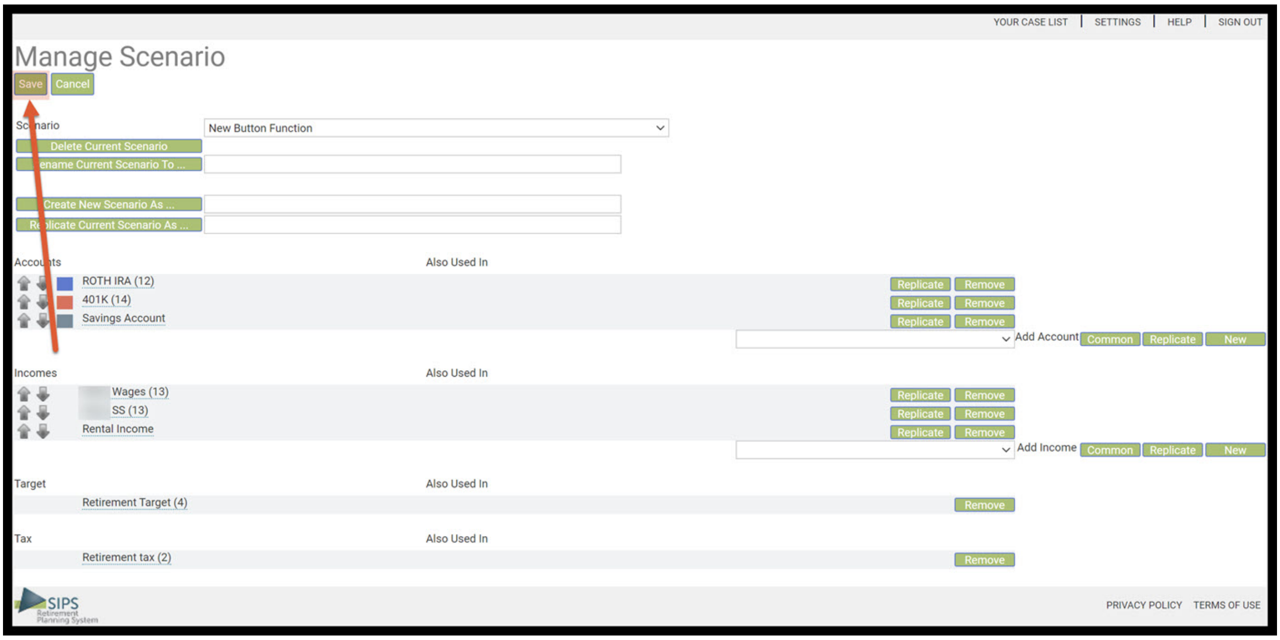
Step 7: Save: Click on the green save button underneath the manage income subheading.



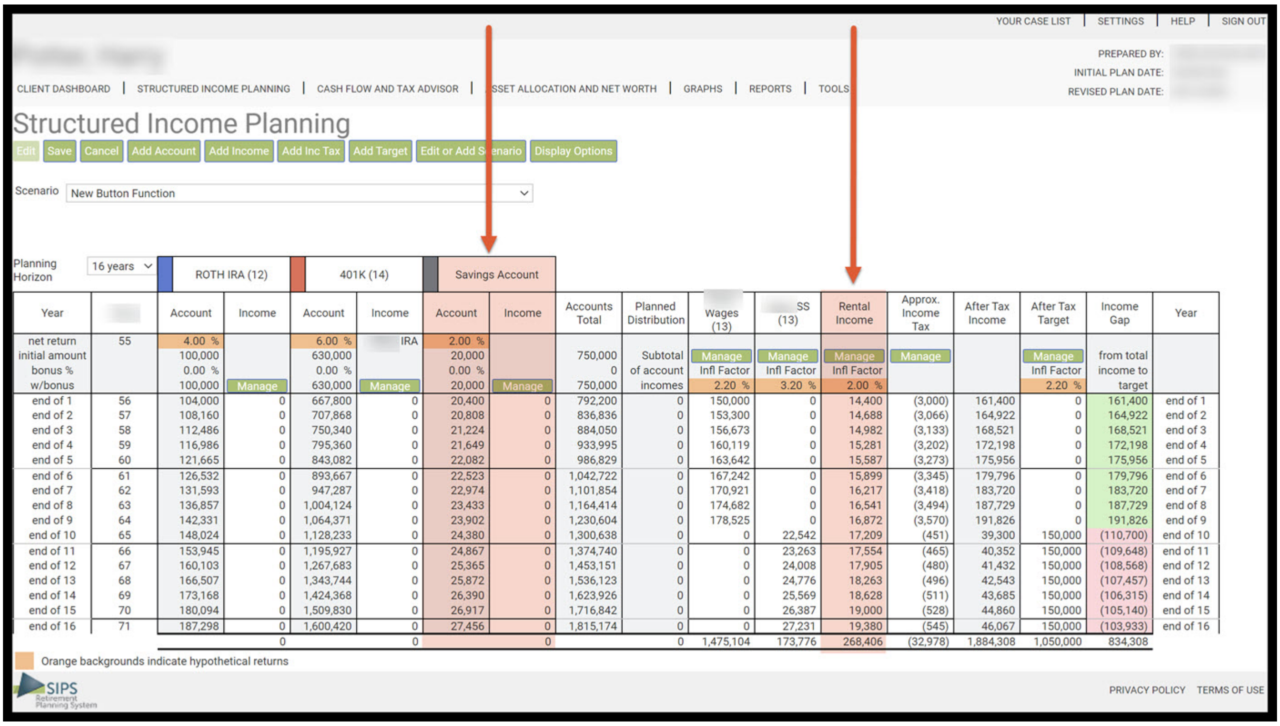
Step 8: Manage Scenario: The new income will be in the list underneath the income section.



Step 9: Save: Click the green Save button underneath the Manage Scenario subheading.



Step 10: Structured Income Plan: The new account and income should have new columns in the structured income plan.



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Structured Income Planning

Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add S enario | Display Options

Scenario: New Button Function

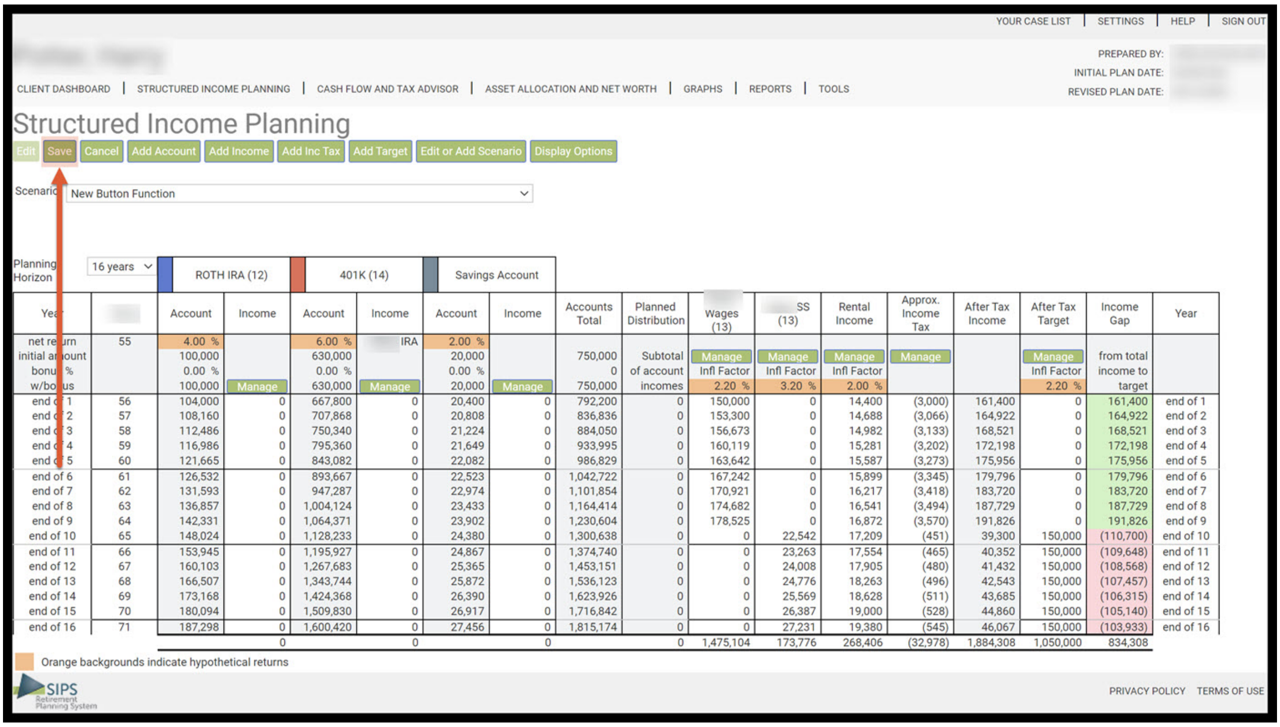
Planning Horizon	16 years	ROTH IRA (12)		401K (14)		Savings Account											
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %	IRA	2.00 %											
initial amount		100,000		630,000		20,000		750,000	Subtotal	Manage	Manage	Manage	Manage		Manage	from total	
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			Infl Factor	income to	
w/bonus		100,000	Manage	630,000	Manage	20,000	Manage	750,000	incomes	2.20 %	3.20 %	2.00 %			2.20 %	target	
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0		0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 11: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



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Structured Income Planning

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

Scenario: New Button Function

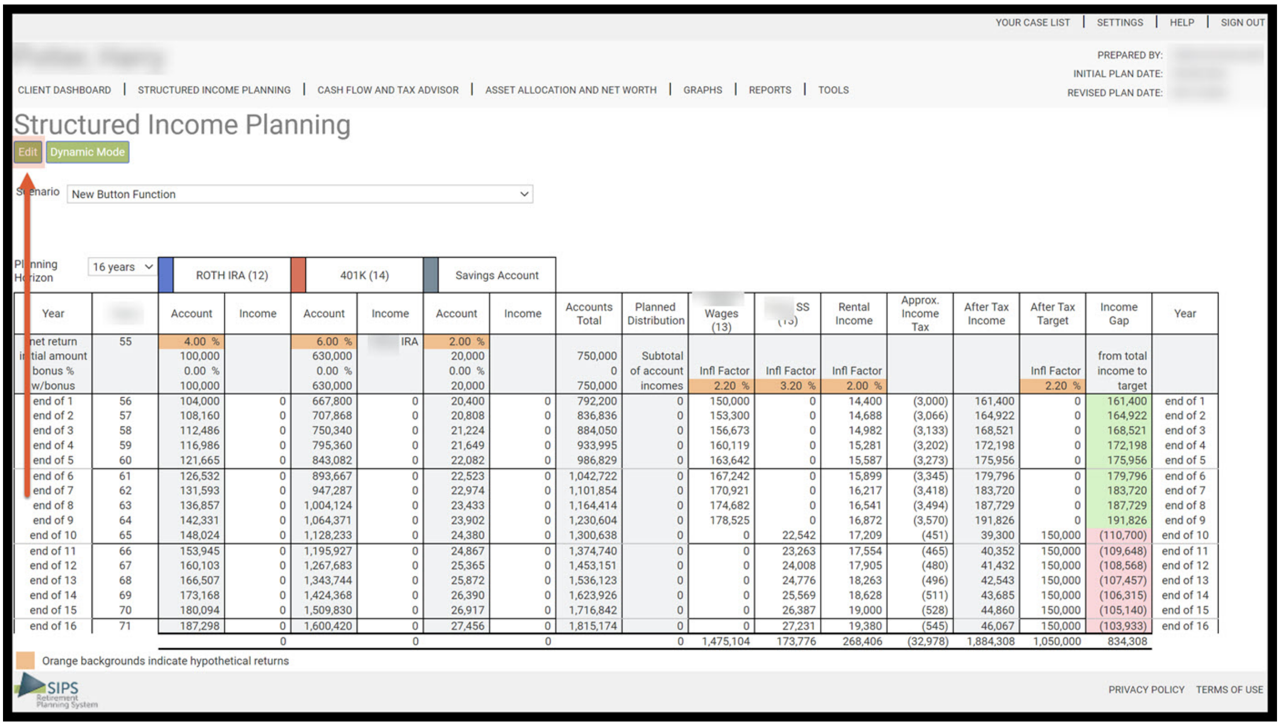
Planning Horizon	16 years	ROTH IRA (12)		401K (14)		Savings Account											
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %	IRA	2.00 %											
initial amount		100,000		630,000		20,000		750,000	Subtotal	Manage	Manage	Manage	Manage		Manage	from total	
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			Infl Factor	income to	
w/bonus		100,000	Manage	630,000	Manage	20,000	Manage	750,000	incomes	2.20 %	3.20 %	2.00 %			2.20 %	target	
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0		0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 12: 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.



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Structured Income Planning

Edit | Dynamic Mode

Scenario: New Button Function

Planning Horizon: 16 years

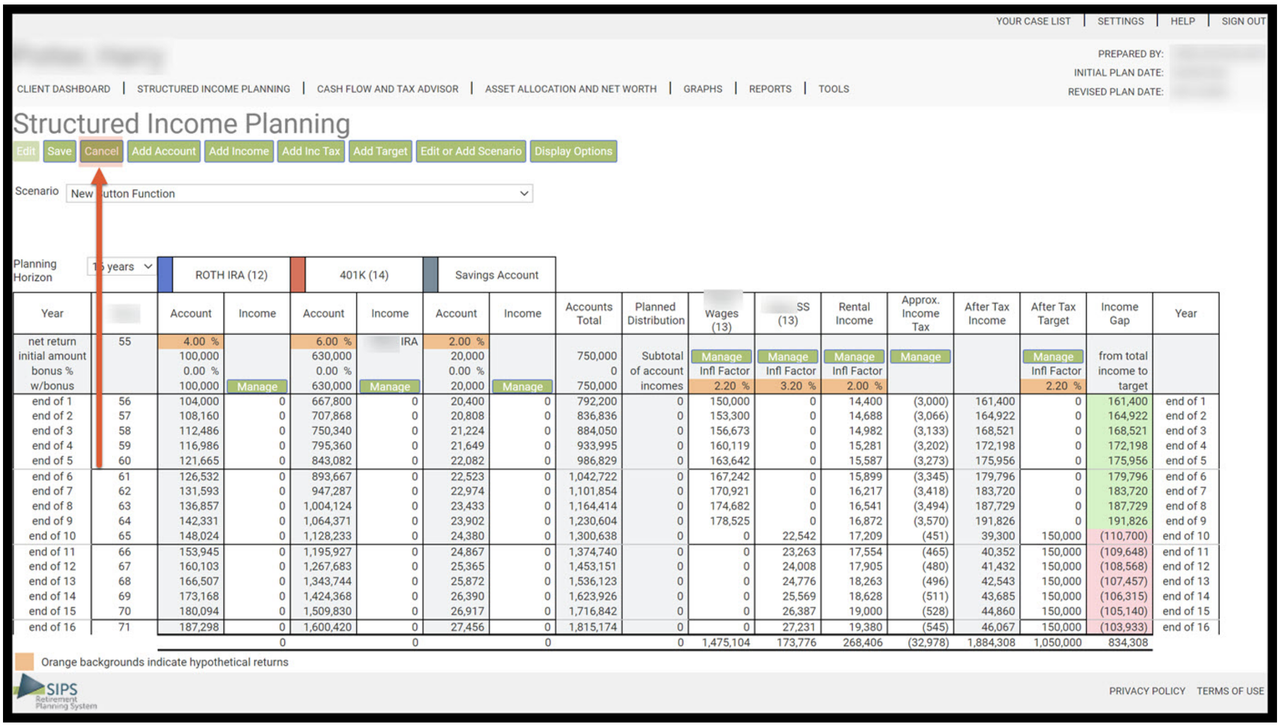
Year		ROTH IRA (12) Account	ROTH IRA (12) Income	401K (14) Account	401K (14) Income	Savings Account Account	Savings Account Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %	IRA	2.00 %											
initial amount		100,000		630,000		20,000		750,000	Subtotal							from total	
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			Infl Factor	income to	
w/bonus		100,000		630,000		20,000		750,000	incomes	2.20 %	3.20 %	2.00 %			2.20 %	target	
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0		0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 13: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



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Structured Income Planning

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

Scenario: New Button Function

Planning Horizon: 16 years

Year		ROTH IRA (12) Account	ROTH IRA (12) Income	401K (14) Account	401K (14) Income	Savings Account Account	Savings Account Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %	IRA	2.00 %											
initial amount		100,000		630,000		20,000		750,000	Subtotal	Manage	Manage	Manage	Manage		Manage	from total	
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			Infl Factor	income to	
w/bonus		100,000	Manage	630,000	Manage	20,000	Manage	750,000	incomes	2.20 %	3.20 %	2.00 %			2.20 %	target	
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
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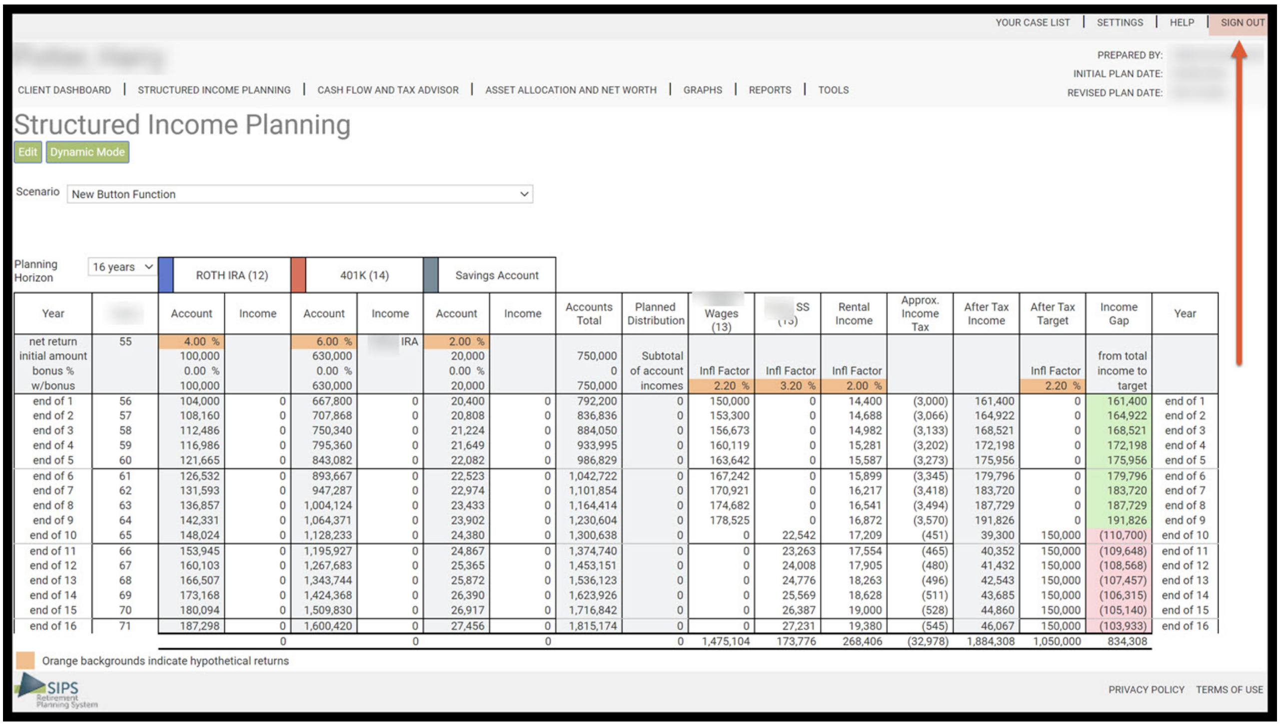
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0		0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 14: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



		ROTH IRA (12)		401K (14)		Savings Account											
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (13)	SS (13)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	55	4.00 %		6.00 %	IRA	2.00 %											
initial amount		100,000		630,000		20,000		750,000	Subtotal							from total	
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor			Infl Factor	income to	
w/bonus		100,000		630,000		20,000		750,000	incomes	2.20 %	3.20 %	2.00 %			2.20 %	target	
end of 1	56	104,000	0	667,800	0	20,400	0	792,200	0	150,000	0	14,400	(3,000)	161,400	0	161,400	end of 1
end of 2	57	108,160	0	707,868	0	20,808	0	836,836	0	153,300	0	14,688	(3,066)	164,922	0	164,922	end of 2
end of 3	58	112,486	0	750,340	0	21,224	0	884,050	0	156,673	0	14,982	(3,133)	168,521	0	168,521	end of 3
end of 4	59	116,986	0	795,360	0	21,649	0	933,995	0	160,119	0	15,281	(3,202)	172,198	0	172,198	end of 4
end of 5	60	121,665	0	843,082	0	22,082	0	986,829	0	163,642	0	15,587	(3,273)	175,956	0	175,956	end of 5
end of 6	61	126,532	0	893,667	0	22,523	0	1,042,722	0	167,242	0	15,899	(3,345)	179,796	0	179,796	end of 6
end of 7	62	131,593	0	947,287	0	22,974	0	1,101,854	0	170,921	0	16,217	(3,418)	183,720	0	183,720	end of 7
end of 8	63	136,857	0	1,004,124	0	23,433	0	1,164,414	0	174,682	0	16,541	(3,494)	187,729	0	187,729	end of 8
end of 9	64	142,331	0	1,064,371	0	23,902	0	1,230,604	0	178,525	0	16,872	(3,570)	191,826	0	191,826	end of 9
end of 10	65	148,024	0	1,128,233	0	24,380	0	1,300,638	0	0	22,542	17,209	(451)	39,300	150,000	(110,700)	end of 10
end of 11	66	153,945	0	1,195,927	0	24,867	0	1,374,740	0	0	23,263	17,554	(465)	40,352	150,000	(109,648)	end of 11
end of 12	67	160,103	0	1,267,683	0	25,365	0	1,453,151	0	0	24,008	17,905	(480)	41,432	150,000	(108,568)	end of 12
end of 13	68	166,507	0	1,343,744	0	25,872	0	1,536,123	0	0	24,776	18,263	(496)	42,543	150,000	(107,457)	end of 13
end of 14	69	173,168	0	1,424,368	0	26,390	0	1,623,926	0	0	25,569	18,628	(511)	43,685	150,000	(106,315)	end of 14
end of 15	70	180,094	0	1,509,830	0	26,917	0	1,716,842	0	0	26,387	19,000	(528)	44,860	150,000	(105,140)	end of 15
end of 16	71	187,298	0	1,600,420	0	27,456	0	1,815,174	0	0	27,231	19,380	(545)	46,067	150,000	(103,933)	end of 16
			0		0		0		0	1,475,104	173,776	268,406	(32,978)	1,884,308	1,050,000	834,308	

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.