

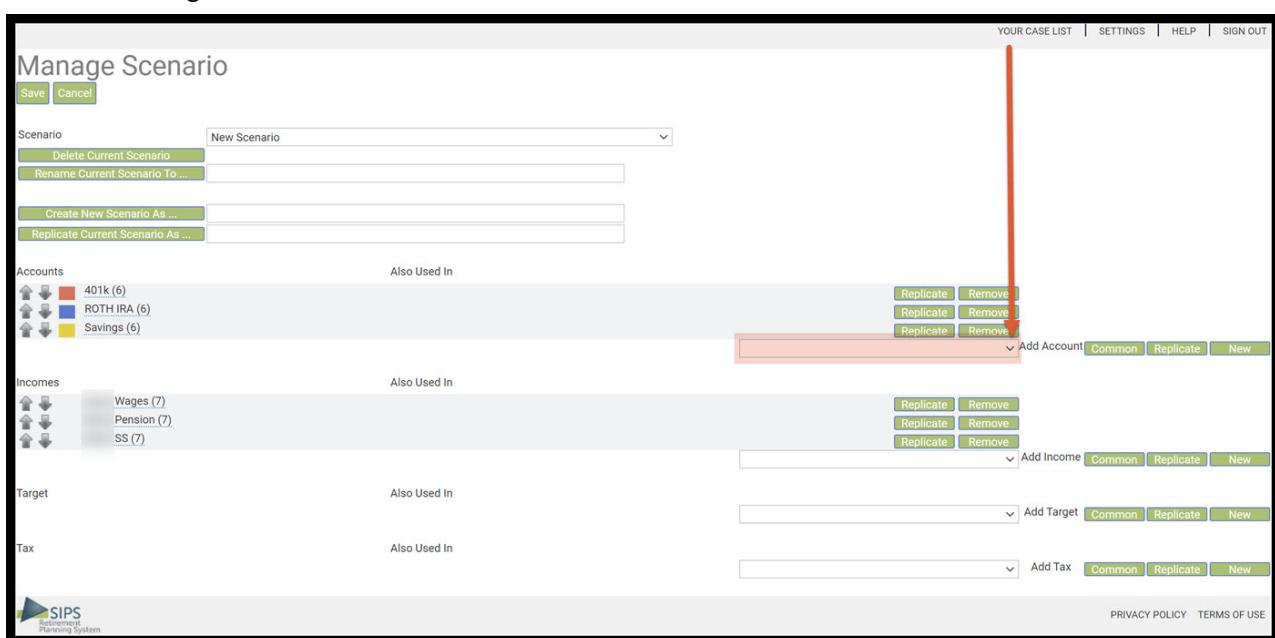
The Common Button on the Manage Scenario Page

01/12/2026 11:11 am EST

The function of the common button on the manage scenario page is to add an existing account, income, target, and/or tax from another scenario into the current scenario you are working in. When you add the new items into the current scenario and you make editing changes to those items, it will only be affected in the scenario you are working in. Below are the step-by-step guideline for adding an existing account, income, target and tax through the Common button.

Adding an account:

Step 1: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add account heading.



The screenshot shows the 'Manage Scenario' page. In the 'Accounts' section, there is a list of accounts: 401k (6), ROTH IRA (6), and Savings (6). Below this list is a 'Also Used In' section with three 'Replicate' and 'Remove' buttons. To the right of this section is a 'Add Account' button with three options: 'Common', 'Replicate', and 'New'. A red arrow points from the text 'Click on the dropdown carrot arrow in the text box next to the add account heading.' to the 'Common' button.

Step 2: Selection: Select which account you would like to add.

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

401(k) (6)

ROTH IRA (6)

Savings (6)

Incomes

Also Used In

Wages (7)

Pension (7)

SS (7)

Target

Also Used In

Tax

Also Used In

Also Used In

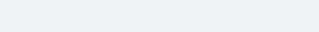
Replicate Remove

Add Account Common Replicate New

Add Income Common Replicate New

Add Target Common Replicate New

Add Tax Common Replicate New



Step 3: Common: Click on the green Common button.

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

401k (6) ROTH IRA (6) Savings (6)	Replicate Remove Replicate Remove Replicate Remove
Savings (3) ▼ Add Account Common Replicate New	

Incomes

Also Used In

Wages (7) Pension (7) SS (7)	Replicate Remove Replicate Remove 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
--	--

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Smart Investment Planning System

PRIVACY POLICY
TERMS OF USE

Step 4: Table: The new account will be shown under the list of account.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Also Used In

Add Target

Common | Replicate | New

Tax

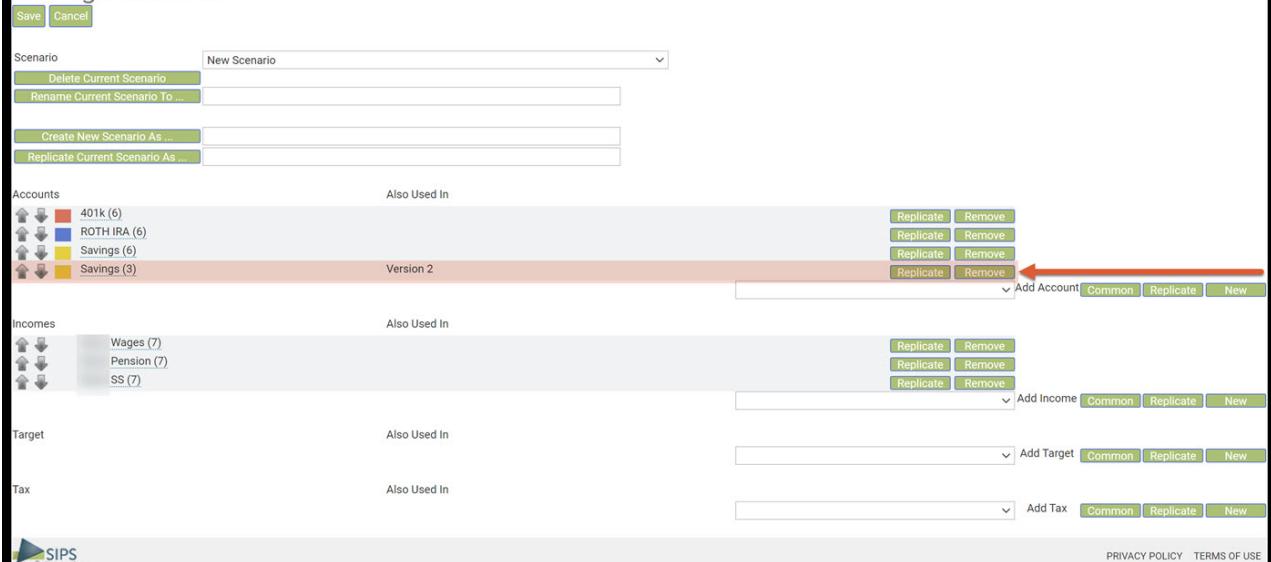
Also Used In

Add Tax

Common | Replicate | New

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE



Adding an income:

Step 5: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add income heading.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Also Used In

Add Target

Common | Replicate | New

Tax

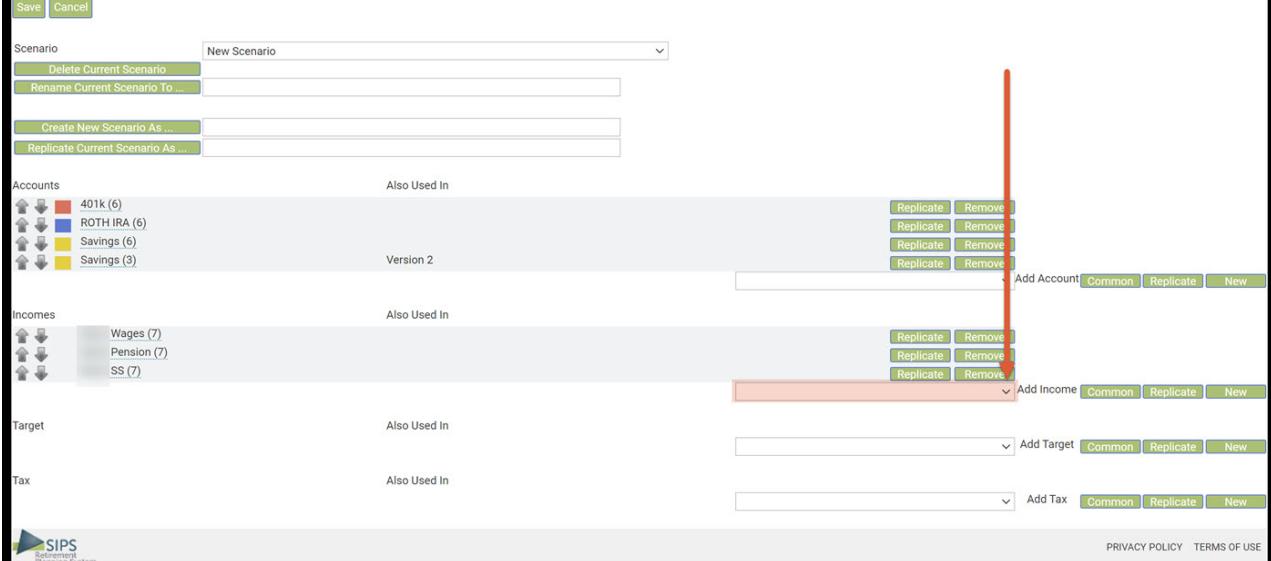
Also Used In

Add Tax

Common | Replicate | New

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE



Step 6: Selection: Select which income you would like to add.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

Also Used In

Renal Income - VRBO income

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Also Used In

Add Target

Tax

Also Used In

Add Tax

PRIVACY POLICY | TERMS OF USE

Step 7: Common: Click on the green Common button.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

Also Used In

Renal Income - VRBO income

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Also Used In

Add Target

Tax

Also Used In

Add Tax

PRIVACY POLICY | TERMS OF USE

Step 8: Table: The new income will be shown under the list of incomes.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

Renal Income | VRBO income

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

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



Adding a Target:

Step 9: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add target heading.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

Renal Income | VRBO income

Also Used In

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Also Used In

Add Target | Common | Replicate | New

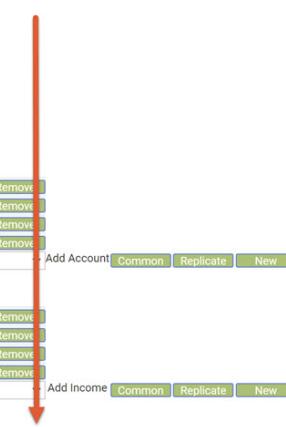
Tax

Also Used In

Add Tax | Common | Replicate | New

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE



Step 10: Selection: Select which target you would like to add.

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

401k (6)

ROTH IRA (6)

Savings (6)

Savings (3)

Also Used In

Version 2

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Add Account Common Replicate New

Incomes

Wages (7)

Pension (7)

SS (7)

Rental Income

VRBO income

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Add Income Common Replicate New

Target

Also Used In

Version 2

Add Target Common Replicate New

Tax

Also Used In

Add Tax Common Replicate New

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 11: Common: Click on the green Common button.

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

401k (6)

ROTH IRA (6)

Savings (6)

Savings (3)

Also Used In

Version 2

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Add Account Common Replicate New

Incomes

Wages (7)

Pension (7)

SS (7)

Rental Income

VRBO income

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Add Income Common Replicate New

Target

Also Used In

Version 2

Add Target Common Replicate New

Tax

Also Used In

Add Tax Common Replicate New

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 12: Table: The new target will also show which other scenario the account is being used.

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

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Add Account | Common | Replicate | New

Incomes

Also Used In

Wages (7) | Pension (7) | SS (7)

Rental Income | VRBO income

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Add Income | Common | Replicate | New

Target

Also Used In

Version 2

Version 2

Remove

Tax

Also Used In

Add Tax | Common | Replicate | New

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Adding a Tax:

Step 13: Drop Down Carrot Arrow: Click on the dropdown carrot arrow in the text box next to the add tax heading.

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

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Add Account | Common | Replicate | New

Incomes

Also Used In

Wages (7) | Pension (7) | SS (7)

Rental Income | VRBO income

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Add Income | Common | Replicate | New

Target

Also Used In

Version 2

Version 2

Remove

Tax

Also Used In

Add Tax | Common | Replicate | New

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 14: Selection: Select which tax you would like to add.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

kenai Income | VRBO Income

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Version 2

Also Used In

Version 2

Remove

Tax

Also Used In

Version 3

Add Tax | Common | Replicate | New

PRIVACY POLICY | TERMS OF USE

SIPS Retirement Planning System

Step 15: Common: Click on the green Common button.

Manage Scenario

Save | Cancel

Scenario

New Scenario

Delete Current Scenario | Rename Current Scenario To ...

Create New Scenario As ... | Replicate Current Scenario As ...

Accounts

401k (6) | ROTH IRA (6) | Savings (6) | Savings (3)

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Incomes

Wages (7) | Pension (7) | SS (7)

kenai Income | VRBO Income

Also Used In

Version 2

Replicate | Remove

Replicate | Remove

Replicate | Remove

Replicate | Remove

Target

Version 2

Also Used In

Version 2

Remove

Tax

Also Used In

Version 3

Add Tax | Common | Replicate | New

PRIVACY POLICY | TERMS OF USE

SIPS Retirement Planning System

Step 16: Table: The new tax will also show which other scenario the account is being used.

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

401k (6)

ROTH IRA (6)

Savings (6)

Savings (3)

Also Used In

Version 2

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Incomes

Wages (7)

Pension (7)

SS (7)

Rental Income

VRBO Income

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Target

Version 2

Also Used In

Version 2

Remove

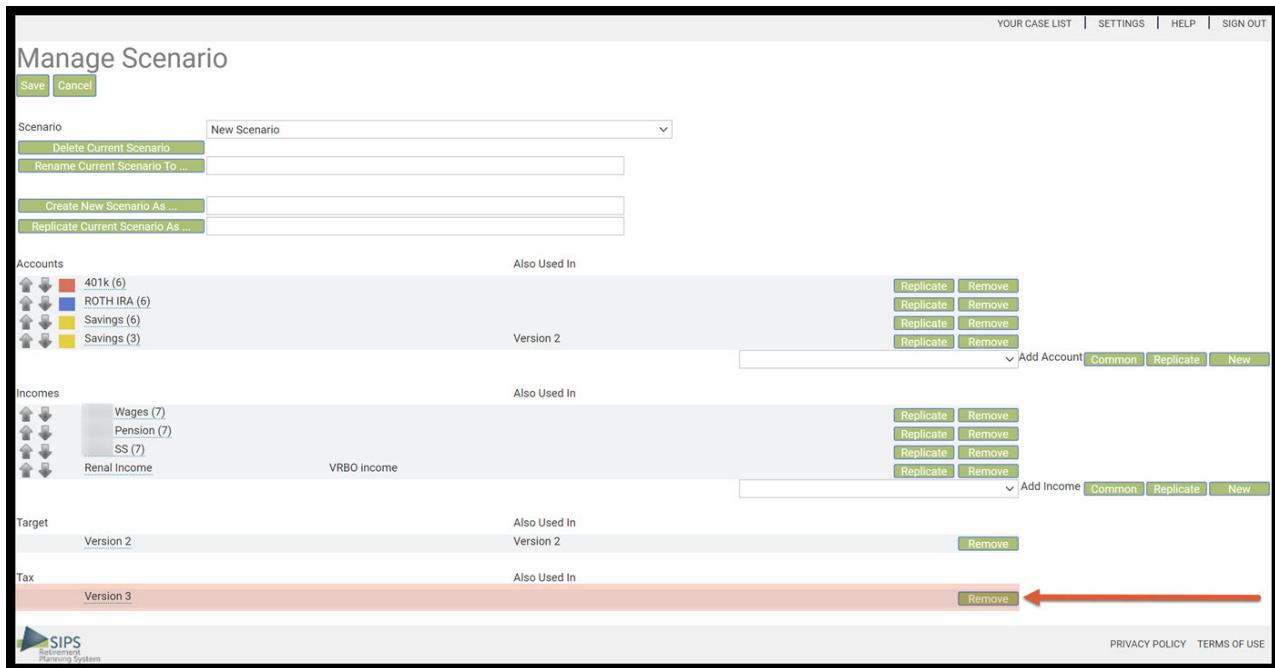
Tax

Version 3

Also Used In

Remove

PRIVACY POLICY TERMS OF USE



Step 17: Save: Click the green Save button underneath the Manage Scenario subheading.

Manage Scenario

Save Cancel

Scenario

New Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts

401k (6)

ROTH IRA (6)

Savings (6)

Savings (3)

Also Used In

Version 2

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Incomes

Wages (7)

Pension (7)

SS (7)

Rental Income

VRBO Income

Also Used In

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Target

Version 2

Also Used In

Version 2

Remove

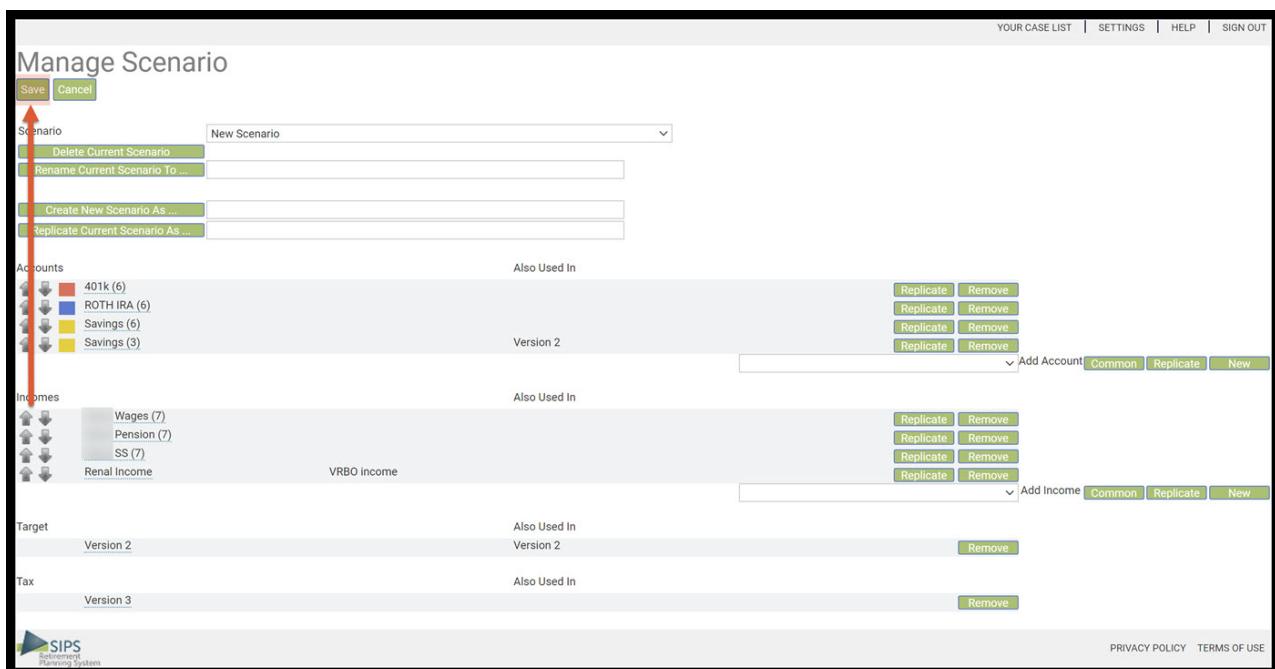
Tax

Version 3

Also Used In

Remove

PRIVACY POLICY TERMS OF USE



Step 18: Structured Income Plan: The new accounts, income, target, and taxes should have new columns in the structured income plan.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

401k (6)			ROTH IRA (6)			Savings (6)			Savings (3)											
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %	829,000	Subtotal of account incomes	2,200	3.20 %	2,000	3.20 %						
initial amount	665,000		100,000		32,000		0	0	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor		
bonus %	0.00 %		0.00 %		0.00 %		0.00 %													
w/bonus	665,000		100,000		32,000		0	0	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor		
end of 1	60	704,900	0	104,000	0	32,320	0	32,340	0	879,540	0	175,000	0	14,400	(1,894)	187,500	0	187,500		
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	19,584	(1,984)	196,450	0	196,450	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	0	970,451	0	182,785	0	19,976	(2,028)	200,733	0	200,733	end of 3	
end of 4	63	830,547	0	116,986	0	33,299	0	33,299	0	1,023,131	0	186,806	0	20,375	(2,072)	205,109	0	205,109	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	0	1,078,850	0	190,916	0	20,783	(2,117)	209,581	0	209,581	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	0	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	0	194,601	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	0	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	0	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	0	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	0	207,647	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	0	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	0	214,412	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	0	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	0	221,344	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	0	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	0	209,581	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	0	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	0	235,726	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	0	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	0	243,184	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	0	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	0	250,827	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	0	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	0	258,660	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	0	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	0	266,686	end of 16

Orange backgrounds indicate hypothetical returns

PRIVACY POLICY | TERMS OF USE

SIPS Retirement Planning System

Step 19: 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:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

401k (6)			ROTH IRA (6)			Savings (6)			Savings (3)											
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year	
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %	829,000	Subtotal of account incomes	2,200	3.20 %	2,000	3.20 %						
initial amount	665,000		100,000		32,000		0	0	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor		
bonus %	0.00 %		0.00 %		0.00 %		0.00 %													
w/bonus	665,000		100,000		32,000		0	0	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor	Manage	Infl Factor		
end of 1	60	704,900	0	104,000	0	32,320	0	32,340	0	879,540	0	175,000	0	14,400	(1,894)	187,500	0	187,500		
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	19,584	(1,984)	196,450	0	196,450	end of 2	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	0	970,451	0	182,785	0	19,976	(2,028)	200,733	0	200,733	end of 3	
end of 4	63	830,547	0	116,986	0	33,299	0	33,299	0	1,023,131	0	186,806	0	20,375	(2,072)	205,109	0	205,109	end of 4	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	0	1,078,850	0	190,916	0	20,783	(2,117)	209,581	0	209,581	end of 5	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	0	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	0	194,601	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	0	1,200,124	0	199,408	30,960	26,842	21,622	(2,788)	276,045	0	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	0	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	0	207,647	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	0	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	0	214,412	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	0	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	0	221,344	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	0	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	0	209,581	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	0	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	0	235,726	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	0	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	0	243,184	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	0	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	0	250,827	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	0	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	0	258,660	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	0	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	0	266,686	end of 16

Orange backgrounds indicate hypothetical returns

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SIPS Retirement Planning System

Step 20: 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.

STRUCTURED INCOME PLANNING

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

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

		401k (6)		ROTH IRA (6)		Savings (6)		Savings (3)													
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %		829,000	Subtotal of account incomes	2.20 %	3.20 %	2.00 %							
initial amount	665,000		100,000		32,000		32,000		0	920,640	0	178,850	0	0	14,400	(1,894)	187,506	0	187,506	end of 1	
bonus %	0.00 %		0.00 %		0.00 %		0.00 %		0	970,451	0	182,785	0	0	19,976	(1,984)	196,450	0	196,450	end of 2	
w/bonus %	665,000		100,000		32,000		32,000		0	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 3	
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	0	873,540	0	175,000	0	0	14,400	(1,894)	187,506	0	187,506	end of 4	
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	0	19,976	(1,984)	196,450	0	196,450	end of 5	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	0	970,451	0	182,785	0	0	20,375	(2,072)	205,109	0	205,109	end of 6	
end of 4	63	839,547	0	116,986	0	33,309	0	33,309	0	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 7	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	0	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	0	209,581	end of 8	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	0	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	0	269,601	end of 9	
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	0	1,200,124	0	199,408	30,960	26,942	21,622	(2,768)	276,045	0	276,045	end of 10	
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	0	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	0	282,647	end of 11	
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	0	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	0	289,412	end of 12	
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	0	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	0	296,344	end of 13	
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	0	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	0	303,447	end of 14	
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	0	1,570,230	0	222,330	36,241	31,421	23,873	(3,139)	310,726	0	310,726	end of 15	
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	0	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	0	318,184	end of 16	
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	0	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	0	325,827	end of 17	
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	0	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	0	333,660	end of 18	
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	0	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	0	341,686	end of 19	

Orange backgrounds indicate hypothetical returns

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Step 21: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

STRUCTURED INCOME PLANNING

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

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

		401k (6)		ROTH IRA (6)		Savings (6)		Savings (3)													
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %		829,000	Subtotal of account incomes	2.20 %	3.20 %	2.00 %							
initial amount	665,000		100,000		32,000		32,000		0	920,640	0	178,850	0	0	14,400	(1,894)	187,506	0	187,506	end of 1	
bonus %	0.00 %		0.00 %		0.00 %		0.00 %		0	970,451	0	182,785	0	0	19,976	(1,984)	196,450	0	196,450	end of 2	
w/bonus %	665,000		100,000		32,000		32,000		0	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 3	
end of 1	60	704,900	0	104,000	0	32,320	0	32,320	0	873,540	0	175,000	0	0	14,400	(1,894)	187,506	0	187,506	end of 4	
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	0	19,976	(1,984)	196,450	0	196,450	end of 5	
end of 3	62	792,025	0	112,486	0	32,970	0	32,970	0	970,451	0	182,785	0	0	20,375	(2,072)	205,109	0	205,109	end of 6	
end of 4	63	839,547	0	116,986	0	33,309	0	33,309	0	1,023,131	0	186,806	0	0	20,375	(2,072)	205,109	0	205,109	end of 7	
end of 5	64	889,920	0	121,665	0	33,632	0	33,632	0	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	0	209,581	end of 8	
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	0	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	0	269,601	end of 9	
end of 7	66	999,914	0	131,593	0	34,308	0	34,308	0	1,200,124	0	199,408	30,960	26,942	21,622	(2,788)	276,045	0	276,045	end of 10	
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	0	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	0	282,647	end of 11	
end of 9	68	1,123,503	0	142,331	0	34,998	0	34,998	0	1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	0	289,412	end of 12	
end of 10	69	1,190,913	0	148,024	0	35,348	0	35,348	0	1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,344	0	296,344	end of 13	
end of 11	70	1,262,368	0	153,945	0	35,701	0	35,701	0	1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	0	303,447	end of 14	
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	0	1,570,230	0	222,330	36,241	31,421	23,873	(3,139)	310,726	0	310,726	end of 15	
end of 13	72	1,418,396	0	166,507	0	36,419	0	36,419	0	1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	0	318,184	end of 16	
end of 14	73	1,503,500	0	173,168	0	36,783	0	36,783	0	1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	0	325,827	end of 17	
end of 15	74	1,593,710	0	180,094	0	37,151	0	37,151	0	1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	0	333,660	end of 18	
end of 16	75	1,689,332	0	187,298	0	37,523	0	37,523	0	1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	0	341,686	end of 19	

Orange backgrounds indicate hypothetical returns

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Step 22: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

PREPARED BY: SIGN OUT
 INITIAL PLAN DATE: REVISIED PLAN DATE:

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		401k (6)		ROTH IRA (6)		Savings (6)		Savings (3)													
Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return	59 6.00 %	IRA 4.00 %		1.00 %		1.00 %			829,000	Subtotal of account incomes	2.20 %	3.20 %	2.00 %								
initial amount	665,000	100,000		32,000		32,000			829,000	Infl Factor	Infl Factor	Infl Factor	Infl Factor								
bonus % w/bonus	0.00 %	0.00 %		0.00 %		0.00 %				3.20 %	3.20 %	2.00 %									
665,000	100,000		32,000		32,000																
end of 1	60 704,900	0 104,000		0 32,320		0 32,320			873,540	0	175,000	0	0 14,400	(1,894)	187,506	0	187,506	0	end of 1		
end of 2	61 747,194	0 108,160		0 32,643		0 32,643			920,640	0	178,850	0	0 19,844	(1,984)	196,450	0	196,450	0	end of 2		
end of 3	62 792,053	0 112,486		0 32,970		0 32,970			970,451	0	182,785	0	0 19,976	(2,028)	200,733	0	200,733	0	end of 3		
end of 4	63 839,547	0 116,986		0 33,309		0 33,309			1,023,131	0	186,665	0	0 20,873	(2,072)	205,109	0	205,109	0	end of 4		
end of 5	64 889,220	0 121,665		0 33,632		0 33,632			1,072,890	0	190,916	0	0 20,783	(2,117)	209,591	0	209,591	0	end of 5		
end of 6	65 943,315	0 126,472		0 33,969		0 33,969			1,137,784	0	195,116	30,000	26,010	21,199	(2,724)	266,601	0	266,601	0	end of 6	
end of 7	66 999,914	0 131,593		0 34,308		0 34,308			1,200,124	0	199,408	30,960	26,942	21,622	(2,768)	276,045	0	276,045	0	end of 7	
end of 8	67 1,059,908	0 136,857		0 34,651		0 34,651			1,264,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	0	282,647	0	end of 8	
end of 9	68 1,123,503	0 142,331		0 34,998		0 34,998			1,335,830	0	208,279	32,973	28,588	22,496	(2,923)	289,412	0	289,412	0	end of 9	
end of 10	69 1,190,913	0 148,024		0 35,348		0 35,348			1,409,633	0	212,861	34,028	29,503	22,946	(2,993)	296,244	0	296,244	0	end of 10	
end of 11	70 1,262,368	0 153,945		0 35,701		0 35,701			1,487,716	0	217,544	35,117	30,447	23,405	(3,065)	303,447	0	303,447	0	end of 11	
end of 12	71 1,338,310	0 160,103		0 36,058		0 36,058			1,570,230	0	222,330	36,241	31,421	23,873	(3,139)	310,726	0	310,726	0	end of 12	
end of 13	72 1,418,396	0 166,507		0 36,419		0 36,419			1,657,742	0	227,221	37,401	32,426	24,350	(3,214)	318,184	0	318,184	0	end of 13	
end of 14	73 1,503,500	0 173,168		0 36,783		0 36,783			1,750,234	0	232,220	38,597	33,464	24,837	(3,291)	325,827	0	325,827	0	end of 14	
end of 15	74 1,593,710	0 180,094		0 37,151		0 37,151			1,848,106	0	237,329	39,833	34,535	25,334	(3,370)	333,660	0	333,660	0	end of 15	
end of 16	75 1,689,332	0 187,298		0 37,523		0 37,523			1,951,675	0	242,550	41,107	35,640	25,841	(3,451)	341,686	0	341,686	0	end of 16	
				0		0				0	3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958			
				0		0															

Orange backgrounds indicate hypothetical returns

SIPS
Structured Income 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: support@planscout.com.