

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 displays the 'Manage Scenario' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the title 'Manage Scenario', there are 'Save' and 'Cancel' buttons. The 'Scenario' section includes a dropdown menu currently set to 'New Scenario', and buttons for 'Delete Current Scenario', 'Rename Current Scenario To ...', 'Create New Scenario As ...', and 'Replicate Current Scenario As ...'. The main content area is divided into sections for 'Accounts', 'Incomes', 'Target', and 'Tax'. Each section has a list of items with 'Also Used In' links and 'Replicate'/'Remove' buttons. The 'Accounts' section lists '401k (6)', 'ROTH IRA (6)', and 'Savings (6)'. The 'Incomes' section lists 'Wages (7)', 'Pension (7)', and 'SS (7)'. The 'Add Account' section is highlighted with a red box, and a red vertical line points to the dropdown arrow next to it. The 'Add Account' section also includes 'Common', 'Replicate', and 'New' buttons. The 'Add Income', 'Add Target', and 'Add Tax' sections also have similar buttons. The SIPS logo is in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' links are in the bottom right.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts Also Used In

Account	Also Used In	Replicate	Remove
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
		Add Account	

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
		Add Income	

Target Also Used In

[Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax Also Used In

[Add Tax](#) [Common](#) [Replicate](#) [New](#)

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PRIVACY POLICY | TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts Also Used In

Account	Also Used In	Replicate	Remove
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
		Add Account	

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
		Add Income	

Target Also Used In

[Add Target](#) [Common](#) [Replicate](#) [New](#)

Tax Also Used In

[Add Tax](#) [Common](#) [Replicate](#) [New](#)

SIPS Retirement Planning Systems

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts Also Used In

Account	Also Used In	Replicate	Remove
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)	Version 2	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		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

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts Also Used In

Account	Also Used In	Replicate	Remove
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)	Version 2	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Income	Also Used In	Replicate	Remove
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		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 6: Selection: Select which income you would like to add.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts	Also Used In		
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)		Replicate	Remove
Version 2			
		Add Account	Common Replicate New

Incomes	Also Used In		
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income - VRBO Income		Add Income	Common Replicate New

Target

Also Used In

Add Target

Common Replicate New

Tax

Also Used In

Add Tax

Common Replicate New

SIPS

PRIVACY POLICY | TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts	Also Used In		
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)		Replicate	Remove
Version 2			
		Add Account	Common Replicate New

Incomes	Also Used In		
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income - VRBO Income		Add Income	Common Replicate New

Target

Also Used In

Add Target

Common Replicate New

Tax

Also Used In

Add Tax

Common Replicate New

SIPS

PRIVACY POLICY | TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts	Also Used In		
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)		Replicate	Remove
Version 2		Replicate	Remove
		<input type="text"/>	Add Account Common Replicate New

Incomes	Also Used In		
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income	VRBO Income	Replicate	Remove
		<input type="text"/>	Add Income Common Replicate New

Target	Also Used In		
		<input type="text"/>	Add Target Common Replicate New

Tax	Also Used In		
		<input type="text"/>	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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts	Also Used In		
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)		Replicate	Remove
Version 2		Replicate	Remove
		<input type="text"/>	Add Account Common Replicate New

Incomes	Also Used In		
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income	VRBO Income	Replicate	Remove
		<input type="text"/>	Add Income Common Replicate New

Target	Also Used In		
		<input type="text"/>	Add Target Common Replicate New

Tax	Also Used In		
		<input type="text"/>	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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To

Create New Scenario As

Replicate Current Scenario As

Accounts

Also Used In

401k (6) Replicate Remove

ROTH IRA (6) Replicate Remove

Savings (6) Replicate Remove

Savings (3) Replicate Remove

Version 2

Add Account Common Replicate New

Incomes

Also Used In

Wages (7) Replicate Remove

Pension (7) Replicate Remove

SS (7) Replicate Remove

Renal Income VRBO Income 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To

Create New Scenario As

Replicate Current Scenario As

Accounts

Also Used In

401k (6) Replicate Remove

ROTH IRA (6) Replicate Remove

Savings (6) Replicate Remove

Savings (3) Replicate Remove

Version 2

Add Account Common Replicate New

Incomes

Also Used In

Wages (7) Replicate Remove

Pension (7) Replicate Remove

SS (7) Replicate Remove

Renal Income VRBO Income 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts	Also Used In	Replicate	Remove	Add Account	Common	Replicate	New
401k (6)		Replicate	Remove				
ROTH IRA (6)		Replicate	Remove				
Savings (6)		Replicate	Remove				
Savings (3)		Replicate	Remove				
Version 2							

Incomes	Also Used In	Replicate	Remove	Add Income	Common	Replicate	New
Wages (7)		Replicate	Remove				
Pension (7)		Replicate	Remove				
SS (7)		Replicate	Remove				
Renal Income	VRBO income	Replicate	Remove				
Version 2							

Target	Also Used In	Remove
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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts	Also Used In	Replicate	Remove	Add Account	Common	Replicate	New
401k (6)		Replicate	Remove				
ROTH IRA (6)		Replicate	Remove				
Savings (6)		Replicate	Remove				
Savings (3)		Replicate	Remove				
Version 2							

Incomes	Also Used In	Replicate	Remove	Add Income	Common	Replicate	New
Wages (7)		Replicate	Remove				
Pension (7)		Replicate	Remove				
SS (7)		Replicate	Remove				
Renal Income	VRBO income	Replicate	Remove				
Version 2							

Target	Also Used In	Remove
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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

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)

kenai Income

VRBO Income

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Add Income Common Replicate New

Target

Version 2

Also Used In

Version 2

Remove

Tax

Also Used In

Version 3

Add Tax Common Replicate New

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

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)

kenai Income

VRBO Income

Replicate Remove

Replicate Remove

Replicate Remove

Replicate Remove

Add Income Common Replicate New

Target

Version 2

Also Used In

Version 2

Remove

Tax

Also Used In

Version 3

Add Tax Common Replicate New

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts	Also Used In	Replicate	Remove
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)		Replicate	Remove
Version 2		Replicate	Remove
		<input type="text"/>	Add Account Common Replicate New

Incomes	Also Used In	Replicate	Remove
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income	VRBO Income	Replicate	Remove
		<input type="text"/>	Add Income Common Replicate New

Target	Also Used In	Remove
Version 2	Version 2	Remove

Tax	Also Used In	Remove
Version 3		Remove

[PRIVACY POLICY](#) [TERMS OF USE](#)

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

[Save](#) [Cancel](#)

Scenario

[Delete Current Scenario](#)

[Rename Current Scenario To ...](#)

[Create New Scenario As ...](#)

[Replicate Current Scenario As ...](#)

Accounts	Also Used In	Replicate	Remove
401k (6)		Replicate	Remove
ROTH IRA (6)		Replicate	Remove
Savings (6)		Replicate	Remove
Savings (3)		Replicate	Remove
Version 2		Replicate	Remove
		<input type="text"/>	Add Account Common Replicate New

Incomes	Also Used In	Replicate	Remove
Wages (7)		Replicate	Remove
Pension (7)		Replicate	Remove
SS (7)		Replicate	Remove
Renal Income	VRBO Income	Replicate	Remove
		<input type="text"/>	Add Income Common Replicate New

Target	Also Used In	Remove
Version 2	Version 2	Remove

Tax	Also Used In	Remove
Version 3		Remove

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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

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

Structured Income Planning

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

Scenario:

Planning Horizon: 16 years

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										
initial amount		665,000		100,000		32,000		32,000	829,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 2.00 %	Manage		Manage Infl Factor 3.20 %	from total income to target	
w/bonus		665,000	Manage	100,000	Manage	32,000	Manage	32,000	829,000										
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	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	19,584	(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	970,451	0	182,785	0	0	19,976	(2,028)	200,733	0	200,733	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	1,023,131	0	186,806	0	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	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	75,000	134,581	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	75,000	194,601	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	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	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	75,000	214,412	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)	296,344	75,000	221,344	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	75,000	228,447	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	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	75,000	243,184	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	75,000	250,827	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	75,000	258,660	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	75,000	266,686	end of 16
			0		0		0			0	3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

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

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

Structured Income Planning

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

Scenario:

Planning Horizon: 16 years

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										
initial amount		665,000		100,000		32,000		32,000	829,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 2.00 %	Manage		Manage Infl Factor 3.20 %	from total income to target	
w/bonus		665,000	Manage	100,000	Manage	32,000	Manage	32,000	829,000										
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	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	19,584	(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	970,451	0	182,785	0	0	19,976	(2,028)	200,733	0	200,733	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	1,023,131	0	186,806	0	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	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	75,000	134,581	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	1,137,784	0	195,116	30,000	26,010	21,198	(2,723)	269,601	75,000	194,601	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	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	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	75,000	214,412	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)	296,344	75,000	221,344	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	75,000	228,447	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	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	75,000	243,184	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	75,000	250,827	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	75,000	258,660	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	75,000	266,686	end of 16
			0		0		0			0	3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

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.

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

Dynamic Mode

Scenario

New Scenario

Planning Horizon

16 years

		401k (6)		ROTH IRA (6)		Savings (6)		Savings (3)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Rental Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
Year		Account	Income	Account	Income	Account	Income	Account	Income											
net return	59	6.00 %	IRA	4.00 %		1.00 %		1.00 %		829,000										
Initial amount		665,000		100,000		32,000		32,000		829,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %	Infl Factor 2.00 %				from total income to target	
w/bonus		665,000		100,000		32,000		32,000		829,000										
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 1
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	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	0	19,976	(2,028)	200,733	0	200,733	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	0	1,023,131	0	186,806	0	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	0	20,783	(2,117)	209,581	75,000	134,581	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	75,000	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	75,000	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	75,000	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	75,000	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	75,000	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	75,000	228,447	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	75,000	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	75,000	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	75,000	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	75,000	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	75,000	266,686	end of 16
			0		0		0		0			3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958	

Orange backgrounds indicate hypothetical returns

SIPS

Retirement Planning Systems

PRIVACY POLICY

TERMS OF USE

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.

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)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
Year		Account	Income	Account	Income	Account	Income	Account	Income											
net return	59	6.00 %	IRA	4.00 %	1.00 %	1.00 %				829,000										
initial amount		665,000	100,000	32,000	32,000	32,000	32,000	32,000	32,000	829,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 2.00 %				from total income to target	
w/bonus		665,000	100,000	32,000	32,000	32,000	32,000	32,000	32,000	829,000										
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 1
end of 2	61	747,194	0	108,160	0	32,643	0	32,643	0	920,640	0	178,850	0	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	0	19,976	(2,028)	200,733	0	200,733	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	0	1,023,131	0	186,806	0	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	0	20,783	(2,117)	209,581	75,000	134,581	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	75,000	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	75,000	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	75,000	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	75,000	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	75,000	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	75,000	228,447	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	75,000	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	75,000	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	75,000	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	75,000	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	75,000	266,686	end of 16
			0		0		0		0			3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958	

Orange backgrounds indicate hypothetical returns

SIPS

Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

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.

										YOUR CASE LIST SETTINGS HELP SIGN OUT									
CLIENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS										PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:									
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 %											
initial amount		665,000		100,000		32,000		32,000	829,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %	Infl Factor 2.00 %			Infl Factor 3.20 %	from total income to target	
bonus %		0.00 %		0.00 %		0.00 %		0.00 %	0										
w/bonus		665,000		100,000		32,000		32,000	829,000										
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	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	19,584	(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	970,451	0	182,785	0	0	19,976	(2,028)	200,733	0	200,733	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	33,299	1,028,181	0	186,806	0	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	1,078,850	0	190,916	0	0	20,783	(2,117)	209,581	75,000	134,581	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	33,969	1,137,784	0	195,116	30,000	26,010	21,198	(2,725)	269,601	75,000	194,601	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	26,842	21,622	(2,788)	276,045	75,000	201,045	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	34,651	1,266,068	0	203,795	31,951	27,701	22,055	(2,855)	282,647	75,000	207,647	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	75,000	214,412	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)	296,344	75,000	221,344	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	75,000	228,447	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	36,058	1,570,330	0	222,330	36,241	31,421	23,873	(3,139)	310,726	75,000	235,726	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	75,000	243,184	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	75,000	250,827	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	75,000	258,660	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	75,000	266,686	end of 16
		0		0		0		0	0		3,313,008	388,208	336,576	353,074	(43,909)	4,346,958	900,000	3,446,958	

Orange backgrounds indicate hypothetical returns



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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.