

Replicating a Current Individual Account and Income Item

09/17/2024 1:36 pm EDT

Under the manage scenario page you can replicate current accounts and incomes that are being used in the current scenarios you are viewing. Below are the step-by-step guidelines for this option.

Step 1: Pick the Account: Under the accounts section, select which account you would like to replicate.

The screenshot shows the 'Manage Scenario' page with the following elements:

- Scenario: New Scenario (1)
- Buttons: Save, Cancel, Delete Current Scenario, Rename Current Scenario To ..., Create New Scenario As ..., Replicate Current Scenario As ...
- Accounts section (highlighted in light red):
 - 401k (7) with Replicate and Remove buttons (indicated by a red arrow)
 - ROTH IRA (7) with Replicate and Remove buttons
 - Savings (9) with Replicate and Remove buttons
- Incomes section (highlighted in light blue):
 - Wages (3) with Replicate and Remove buttons
 - SS (3) with Replicate and Remove buttons
 - Pension (3) with Replicate and Remove buttons
- Target and Tax sections with 'Add Target' and 'Add Tax' buttons.
- Footer: SIPS Retirement Planning System, PRIVACY POLICY, TERMS OF USE

Step 2: Replicate: Click on the green replicate button.

This screenshot is identical to the one above, but with a red arrow pointing to the 'Replicate' button for the '401k (7)' account, indicating the action to be taken.

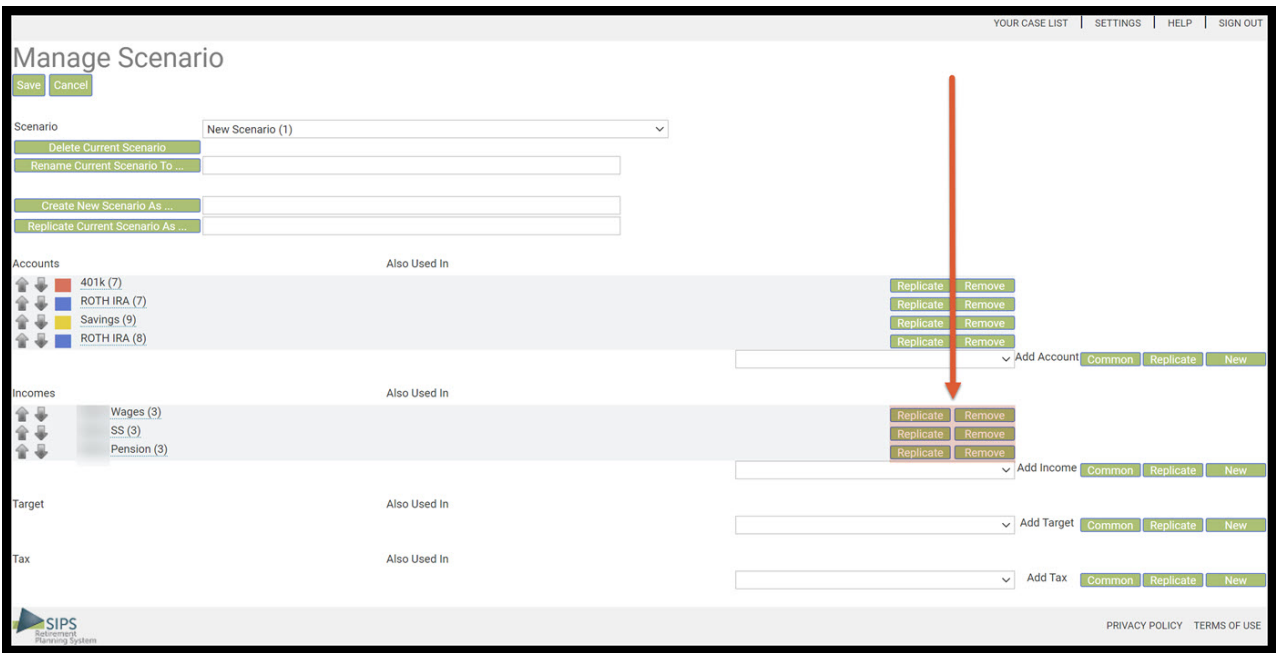
Step 3: Accounts List: The replicated account should show up within the list.

The screenshot shows 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' dropdown is set to 'New Scenario (1)'. There are four buttons: 'Delete Current Scenario', 'Rename Current Scenario To ...', 'Create New Scenario As ...', and 'Replicate Current Scenario As ...'. The 'Accounts' section is highlighted in light blue. It lists four account types: '401k (7)', 'ROTH IRA (7)', 'Savings (9)', and 'ROTH IRA (8)'. Each account type has a 'Replicate' and 'Remove' button. A red arrow points to the 'Replicate' button for the 'ROTH IRA (8)' account. Below the accounts, there are sections for 'Incomes', 'Target', and 'Tax', each with 'Add' buttons and 'Common', 'Replicate', and 'New' options.

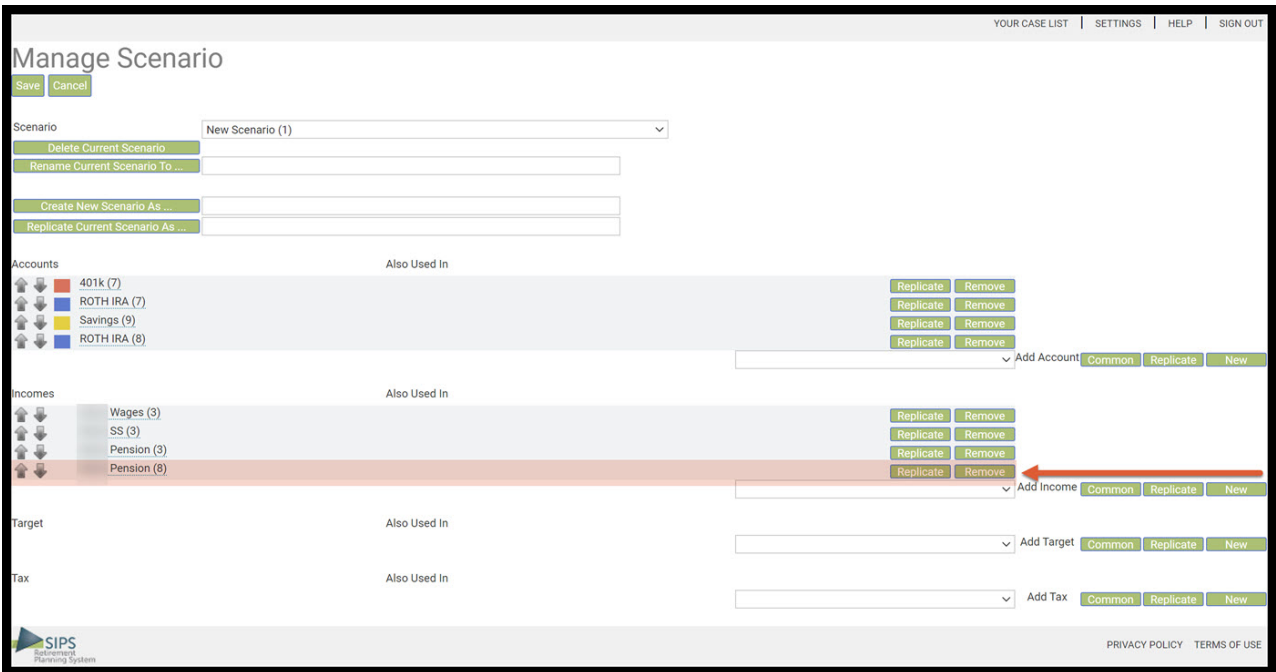
Step 4: Pick the Income: Under the income section, select which account you would like to replicate.

The screenshot shows the 'Manage Scenario' interface. The 'Incomes' section is highlighted in light blue. It lists three income types: 'Wages (3)', 'SS (3)', and 'Pension (3)'. Each income type has a 'Replicate' and 'Remove' button. A red arrow points to the 'Replicate' button for the 'Wages (3)' income type. The 'Accounts' section is now dimmed. The 'Add Income', 'Add Target', and 'Add Tax' buttons are visible at the bottom of the section.

Step 5: Replicate: Click on the green replicate button.



Step 6: Incomes List: The replicated income should show up within the list.



Step 7: Save: Click the green Save button underneath the Manage Scenario subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Scenario

Save Cancel

Scenario: New Scenario (1)

Delete Current Scenario

Rename Current Scenario To ...

Create New Scenario As ...

Replicate Current Scenario As ...

Accounts Also Used In

- 401k (7) Replicate Remove
- ROTH IRA (7) Replicate Remove
- Savings (9) Replicate Remove
- ROTH IRA (8) Replicate Remove

Add Account Common Replicate New

Incomes Also Used In

- Wages (3) Replicate Remove
- SS (3) Replicate Remove
- Pension (3) Replicate Remove
- Pension (8) 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 8: 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

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

Structured Income Planning

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

Scenario: New Scenario (1)

Planning Horizon: 16 years

Year	401k (7)		ROTH IRA (7)		Savings (9)		ROTH IRA (8)		Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
	Account	Income	Account	Income	Account	Income	Account	Income								
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000	0	897,000	0	0	0	0	0
initial amount		665,000	100,000	0.00 %	32,000	0.00 %	100,000	0.00 %	0	0	175,000	0	0	0	175,000	end of 1
bonus %		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0	0	178,850	0	0	0	178,850	end of 2
w/bonus		665,000	100,000	0.00 %	32,000	0.00 %	100,000	0.00 %	897,000	0	182,785	0	0	0	182,785	end of 3
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	0	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	0	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	0	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	0	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	0	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
											0	914,356	336,576	388,208	388,208	2,027,349

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 Line Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon: 16 years

Year	401k (7)		ROTH IRA (7)		Savings (9)		ROTH IRA (8)		Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
	Account	Income	Account	Income	Account	Income	Account	Income								
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000	0	0	0	0	0	0	
initial amount		665,000		100,000		32,000		100,000	0	0	0	0	0	0	0	
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0.00 %	0	0	0	0	0	0	0	
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	0	175,000
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	0	178,850
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	0	182,785
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	0	186,806
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	0	190,916
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	30,000	86,010
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	30,960	88,762
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	31,951	91,603
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	32,973	94,534
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	34,028	97,559
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	35,117	100,681
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	36,241	103,903
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	37,401	107,228
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	38,597	110,659
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	39,833	114,200
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	41,107	117,854
			0		0		0		0		0	914,356	336,576	388,208	388,208	2,027,349

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: 16 years

Year	401k (7)		ROTH IRA (7)		Savings (9)		ROTH IRA (8)		Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
	Account	Income	Account	Income	Account	Income	Account	Income								
net return	59	6.00 %	IRA	4.00 %		1.00 %		4.00 %	897,000	0	0	0	0	0	0	
initial amount		665,000		100,000		32,000		100,000	0	0	0	0	0	0	0	
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0.00 %	0	0	0	0	0	0	0	
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	0	175,000
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	0	178,850
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	0	182,785
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	0	186,806
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	0	190,916
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	30,000	86,010
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	30,960	88,762
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	31,951	91,603
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	32,973	94,534
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	34,028	97,559
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	35,117	100,681
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	36,241	103,903
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	37,401	107,228
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	38,597	110,659
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	39,833	114,200
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	41,107	117,854
			0		0		0		0		0	914,356	336,576	388,208	388,208	2,027,349

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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 Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	4.00 %			897,000							
initial amount		665,000	100,000	32,000	100,000	100,000			897,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
w/bonus		665,000	100,000	32,000	100,000	100,000			897,000							
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
			0		0		0		0		0	914,356	336,576	388,208	388,208	2,027,349

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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.

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:

Planning Horizon:

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS (3)	Pension (3)	Pension (8)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	4.00 %			897,000							
initial amount		665,000	100,000	32,000	100,000	100,000			897,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %	Manage Infl Factor 3.20 %		
w/bonus		665,000	100,000	32,000	100,000	100,000			897,000							
end of 1	60	704,900	0	104,000	0	32,320	0	104,000	0	945,220	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	108,160	0	996,157	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	112,486	0	1,049,968	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	116,986	0	1,106,818	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	121,665	0	1,166,882	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	126,532	0	1,230,347	0	26,010	30,000	30,000	86,010	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	131,593	0	1,297,408	0	26,842	30,960	30,960	88,762	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	136,857	0	1,368,274	0	27,701	31,951	31,951	91,603	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	142,331	0	1,443,163	0	28,588	32,973	32,973	94,534	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	148,024	0	1,522,310	0	29,503	34,028	34,028	97,559	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	153,945	0	1,605,960	0	30,447	35,117	35,117	100,681	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	160,103	0	1,694,374	0	31,421	36,241	36,241	103,903	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	166,507	0	1,787,830	0	32,426	37,401	37,401	107,228	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	173,168	0	1,886,618	0	33,464	38,597	38,597	110,659	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	180,094	0	1,991,049	0	34,535	39,833	39,833	114,200	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	187,298	0	2,101,451	0	35,640	41,107	41,107	117,854	end of 16
			0		0		0		0		0	914,356	336,576	388,208	388,208	2,027,349

Orange backgrounds indicate hypothetical returns

SIPS Retirement 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: +1-888-449-6917 or support@planscout.com.