

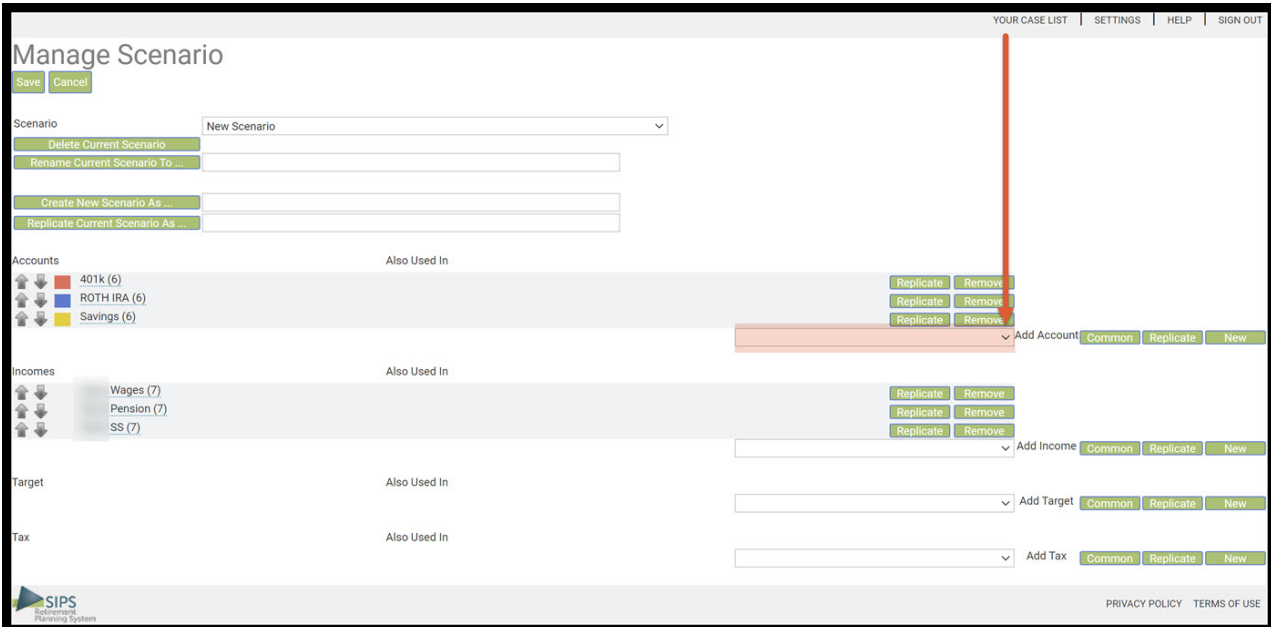
The Replicate Button on the Manage Scenario Page

09/17/2024 1:40 pm EDT

The function of the replicate button on the manage scenario page is to replicate/copy 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 is the step-by-step guideline for adding an existing account and income.

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 right, 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 for 'New Scenario' and buttons for 'Delete Current Scenario', 'Rename Current Scenario To ...', 'Create New Scenario As ...', and 'Replicate Current Scenario As ...'. The 'Accounts' section lists '401k (6)', 'ROTH IRA (6)', and 'Savings (6)', each with 'Replicate' and 'Remove' buttons. The 'Add Account' section has a dropdown arrow highlighted by a red vertical line, with 'Common', 'Replicate', and 'New' buttons below it. The 'Incomes' section lists 'Wages (7)', 'Pension (7)', and 'SS (7)', each with 'Replicate' and 'Remove' buttons. The 'Add Income' section has a dropdown arrow and 'Common', 'Replicate', and 'New' buttons. The 'Target' section has a dropdown arrow and 'Add Target' button with 'Common', 'Replicate', and 'New' buttons. The 'Tax' section has a dropdown arrow and 'Add Tax' button with 'Common', 'Replicate', and 'New' buttons. The SIPS logo is in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' 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

401k (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
ROTH IRA (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Savings (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

401k (2) ▼ Add Account

Incomes Also Used In

Wages (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Pension (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
SS (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Income

Target Also Used In

Add Target

Tax Also Used In

Add Tax

SIPS Retirement Planning System PRIVACY POLICY TERMS OF USE

Step 3: Replicate: Click on the green Replicate 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)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
ROTH IRA (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Savings (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

401k (2) ▼ Add Account

Incomes Also Used In

Wages (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Pension (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
SS (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Income

Target Also Used In

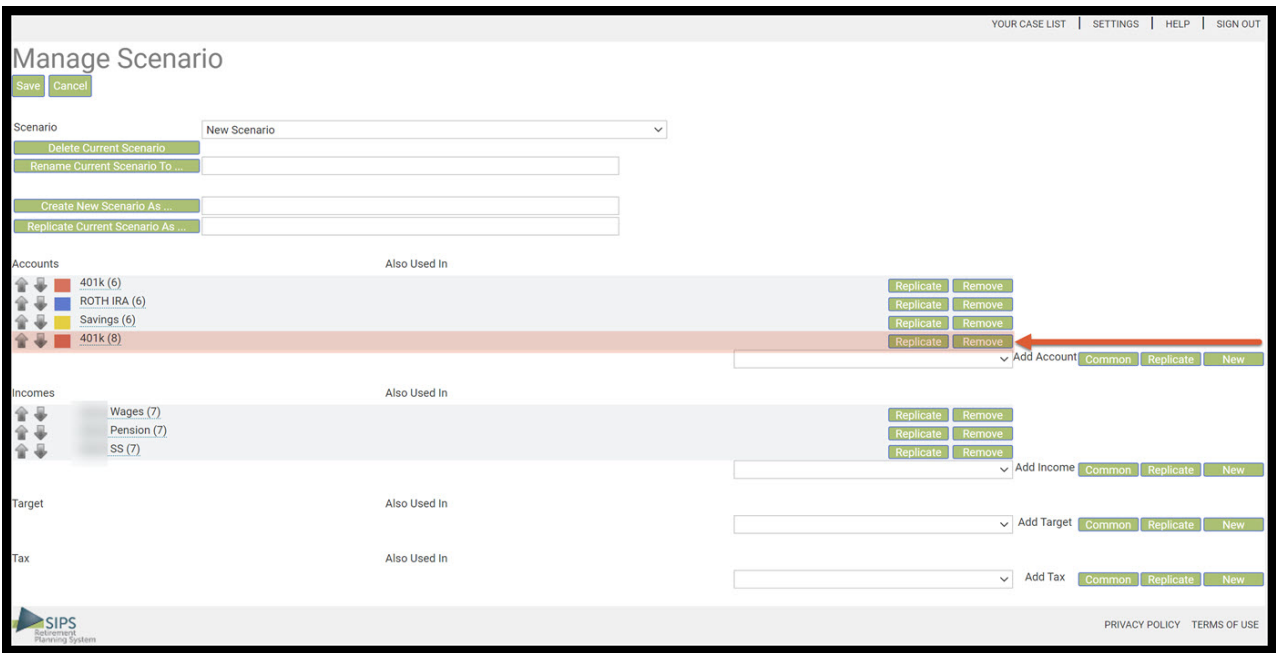
Add Target

Tax Also Used In

Add Tax

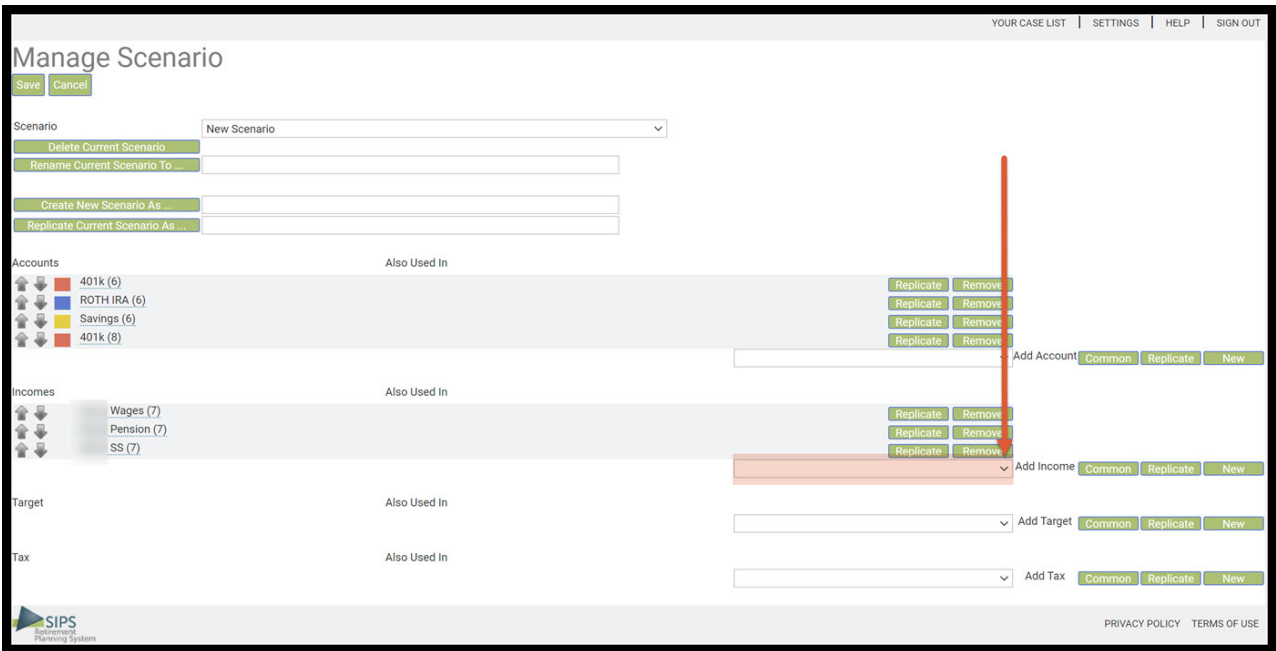
SIPS Retirement Planning System PRIVACY POLICY TERMS OF USE

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



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.



Step 6: Selection: Select which income 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

401k (6)	Replicate	Remove
ROTH IRA (6)	Replicate	Remove
Savings (6)	Replicate	Remove
401k (8)	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (7)	Replicate	Remove
Pension (7)	Replicate	Remove
SS (7)	Replicate	Remove
Pension (5)	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 7: Replicate: Click on the green Replicate 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)	Replicate	Remove
ROTH IRA (6)	Replicate	Remove
Savings (6)	Replicate	Remove
401k (8)	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

Wages (7)	Replicate	Remove
Pension (7)	Replicate	Remove
SS (7)	Replicate	Remove
Pension (5)	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Add Target Common Replicate New

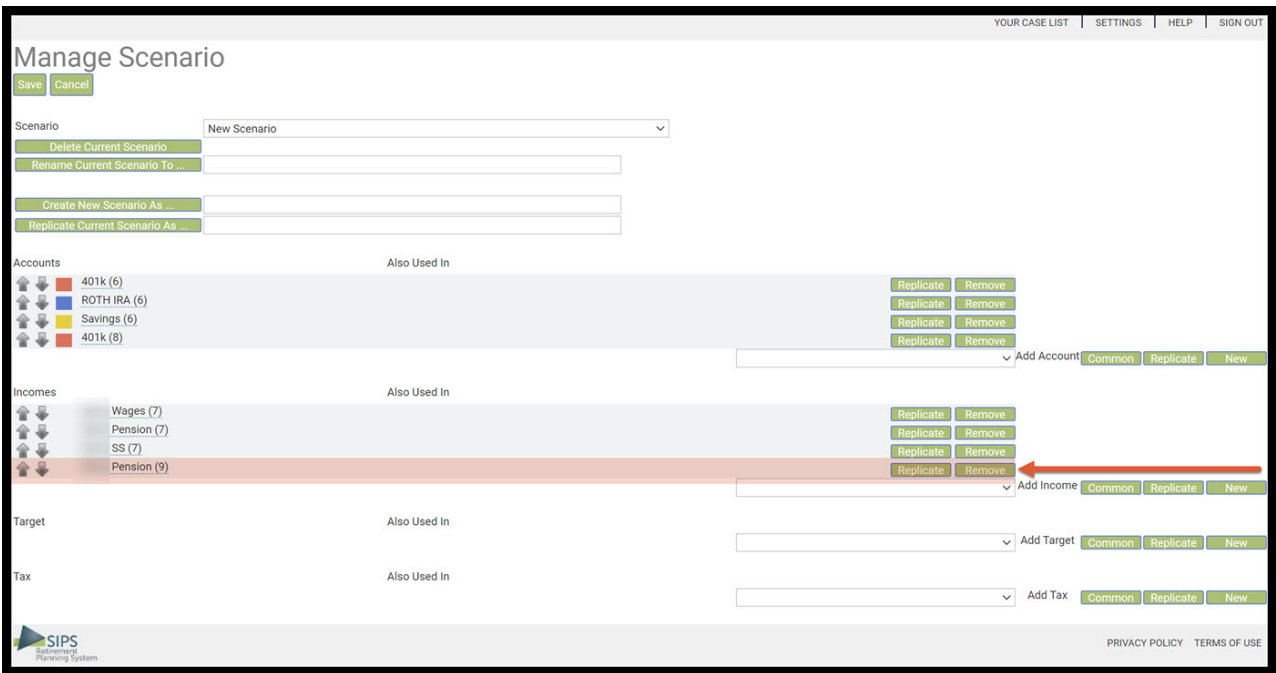
Tax Also Used In

Add Tax Common Replicate New

SIPS Retirement Planning System

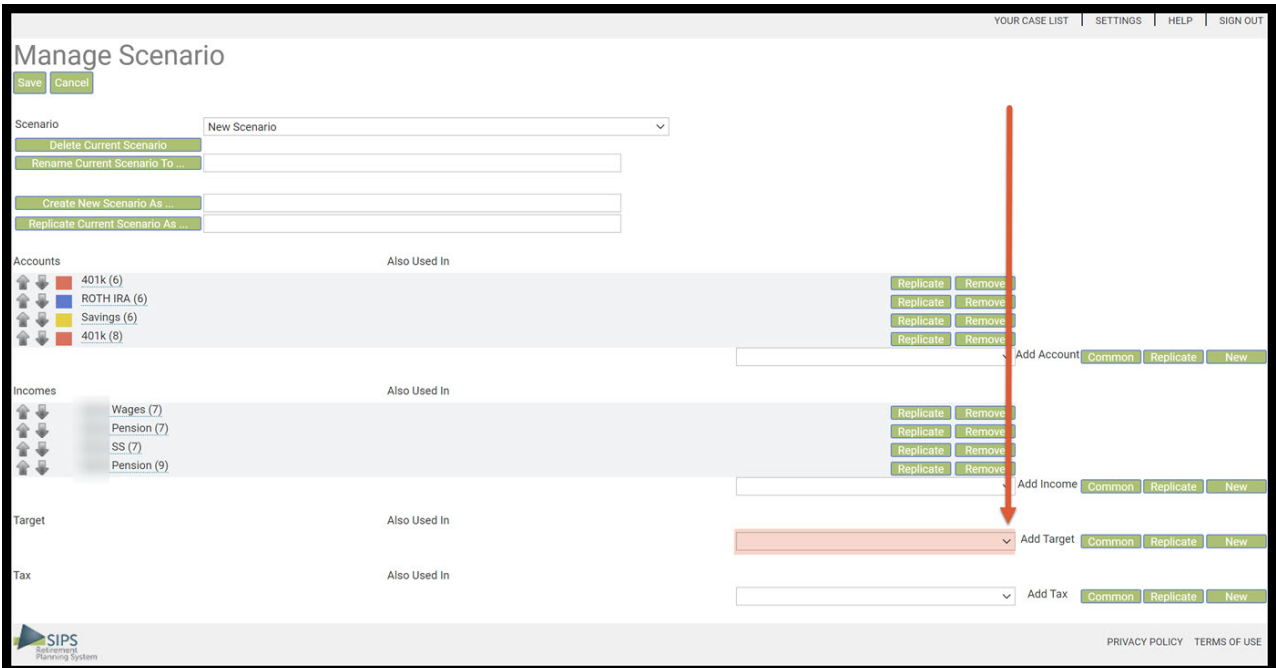
PRIVACY POLICY TERMS OF USE

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



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.



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
	401k (8)	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

	Wages (7)	Replicate	Remove
	Pension (7)	Replicate	Remove
	SS (7)	Replicate	Remove
	Pension (9)	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Version 3

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: Replicate: Click on the green Replicate 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
	401k (8)	Replicate	Remove

Add Account Common Replicate New

Incomes Also Used In

	Wages (7)	Replicate	Remove
	Pension (7)	Replicate	Remove
	SS (7)	Replicate	Remove
	Pension (9)	Replicate	Remove

Add Income Common Replicate New

Target Also Used In

Version 3

Add Target Common **Replicate** New

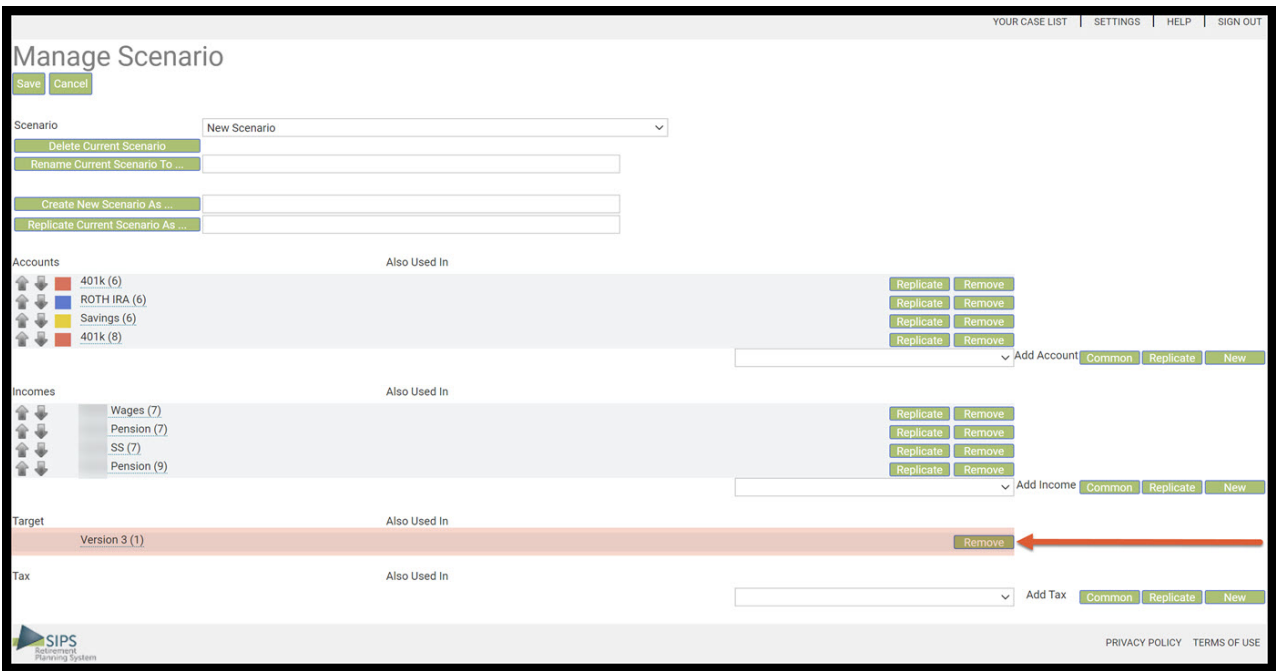
Tax Also Used In

Add Tax Common Replicate New

SIPS Retirement Planning System

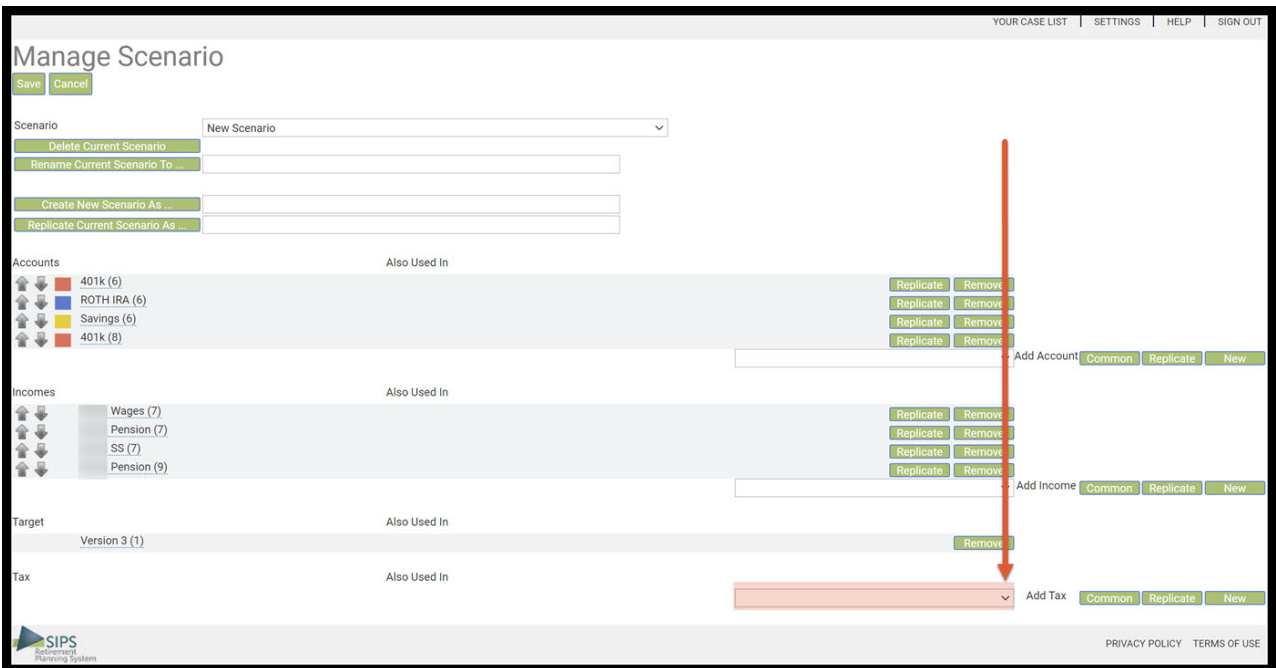
PRIVACY POLICY TERMS OF USE

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



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.



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)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
ROTH IRA (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Savings (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
401k (8)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Account

Incomes Also Used In

Wages (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Pension (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
SS (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Pension (9)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Income

Target Also Used In

Version 3 (1)

Tax Also Used In

Version 3

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 15: Replicate: Click on the green Replicate 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)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
ROTH IRA (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Savings (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
401k (8)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Account

Incomes Also Used In

Wages (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Pension (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
SS (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
Pension (9)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Income

Target Also Used In

Version 3 (1)

Tax Also Used In

Version 3

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

Accounts Also Used In

	401k (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	ROTH IRA (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	Savings (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	401k (8)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Account

Incomes Also Used In

	Wages (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	Pension (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	SS (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	Pension (9)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Income

Target Also Used In

Version 3 (1)	<input type="button" value="Remove"/>
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Tax Also Used In

Version 3 (1)	<input type="button" value="Remove"/>
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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

Accounts Also Used In

	401k (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	ROTH IRA (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	Savings (6)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	401k (8)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Account

Incomes Also Used In

	Wages (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	Pension (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	SS (7)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>
	Pension (9)	<input type="button" value="Replicate"/>	<input type="button" value="Remove"/>

Add Income

Target Also Used In

Version 3 (1)	<input type="button" value="Remove"/>
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Tax Also Used In

Version 3 (1)	<input type="button" value="Remove"/>
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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

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

Structured Income Planning

Scenario: New Scenario

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (9)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	6.00 %	IRA		1,462,000										
initial amount		665,000	0	100,000	32,000	665,000	0	1,462,000	Subtotal of account incomes	2.20 %	3.20 %	3.20 %	3.20 %	Manage					from total income to target
bonus % w/ bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0											
end of 1	60	704,900	0	104,000	0	32,320	0	704,900	0	1,546,120	0	175,000	0	0	(5,250)	169,750	0	169,750	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	747,194	0	1,635,191	0	178,850	0	0	(5,365)	173,484	0	173,484	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	792,025	0	1,729,507	0	182,785	0	0	(5,484)	177,301	0	177,301	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	839,547	0	1,829,379	0	186,806	0	0	(5,604)	181,202	0	181,202	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	889,920	0	1,935,137	0	190,916	0	0	(5,727)	185,188	60,000	125,188	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	943,315	0	2,047,130	0	195,116	30,000	26,010	(8,194)	264,932	60,000	204,932	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	999,914	0	2,165,729	0	199,408	30,960	26,842	(8,397)	271,517	60,000	211,517	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	1,059,908	0	2,291,325	0	203,795	31,951	27,701	(8,606)	278,271	60,000	218,271	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	1,123,503	0	2,424,335	0	208,279	32,973	28,588	(8,821)	285,199	60,000	225,199	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,190,913	0	2,565,198	0	212,861	34,028	29,503	(9,040)	292,305	60,000	232,305	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,262,368	0	2,714,382	0	217,544	35,117	30,447	(9,266)	299,594	60,000	239,594	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,338,110	0	2,872,381	0	222,330	36,241	31,421	(9,497)	307,071	60,000	247,071	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,418,396	0	3,039,719	0	227,221	37,401	32,426	(9,734)	314,741	60,000	254,741	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	1,503,500	0	3,216,950	0	232,220	38,597	33,464	(9,978)	322,609	60,000	262,609	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,593,710	0	3,404,665	0	237,329	39,833	34,535	(10,227)	330,680	60,000	270,680	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,689,332	0	3,603,485	0	242,550	41,107	35,640	(10,483)	338,959	60,000	278,959	end of 16
											0	3,313,008	388,208	336,576	(284,686)	4,192,804	720,000	3,472,804	

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

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

Scenario: New Scenario

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (9)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	6.00 %	IRA		1,462,000										
initial amount		665,000	0	100,000	32,000	665,000	0	1,462,000	Subtotal of account incomes	2.20 %	3.20 %	3.20 %	3.20 %	Manage					from total income to target
bonus % w/ bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0											
end of 1	60	704,900	0	104,000	0	32,320	0	704,900	0	1,546,120	0	175,000	0	0	(5,250)	169,750	0	169,750	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	747,194	0	1,635,191	0	178,850	0	0	(5,365)	173,484	0	173,484	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	792,025	0	1,729,507	0	182,785	0	0	(5,484)	177,301	0	177,301	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	839,547	0	1,829,379	0	186,806	0	0	(5,604)	181,202	0	181,202	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	889,920	0	1,935,137	0	190,916	0	0	(5,727)	185,188	60,000	125,188	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	943,315	0	2,047,130	0	195,116	30,000	26,010	(8,194)	264,932	60,000	204,932	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	999,914	0	2,165,729	0	199,408	30,960	26,842	(8,397)	271,517	60,000	211,517	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	1,059,908	0	2,291,325	0	203,795	31,951	27,701	(8,606)	278,271	60,000	218,271	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	1,123,503	0	2,424,335	0	208,279	32,973	28,588	(8,821)	285,199	60,000	225,199	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,190,913	0	2,565,198	0	212,861	34,028	29,503	(9,040)	292,305	60,000	232,305	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,262,368	0	2,714,382	0	217,544	35,117	30,447	(9,266)	299,594	60,000	239,594	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,338,110	0	2,872,381	0	222,330	36,241	31,421	(9,497)	307,071	60,000	247,071	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,418,396	0	3,039,719	0	227,221	37,401	32,426	(9,734)	314,741	60,000	254,741	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	1,503,500	0	3,216,950	0	232,220	38,597	33,464	(9,978)	322,609	60,000	262,609	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,593,710	0	3,404,665	0	237,329	39,833	34,535	(10,227)	330,680	60,000	270,680	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,689,332	0	3,603,485	0	242,550	41,107	35,640	(10,483)	338,959	60,000	278,959	end of 16
											0	3,313,008	388,208	336,576	(284,686)	4,192,804	720,000	3,472,804	

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

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

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

Dynamic Mode

Scenario: New Scenario

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (9)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	6.00 %	IRA		1,462,000										
initial amount		665,000	100,000	32,000	665,000	32,000	1,462,000												
bonus %		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %												
w/bonus		665,000	100,000	32,000	665,000	32,000	1,462,000												
end of 1	60	704,900	0	104,000	0	32,320	0	704,900	0	1,546,120	0	175,000	0	0	(5,250)	169,750	0	169,750	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	747,194	0	1,635,191	0	178,850	0	0	(5,365)	173,484	0	173,484	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	792,025	0	1,729,507	0	182,785	0	0	(5,484)	177,301	0	177,301	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	839,547	0	1,829,379	0	186,806	0	0	(5,604)	181,202	0	181,202	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	889,920	0	1,935,137	0	190,916	0	0	(5,727)	185,188	60,000	125,188	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	943,315	0	2,047,130	0	195,116	30,000	26,010	(8,194)	264,932	60,000	204,932	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	999,914	0	2,165,729	0	199,408	30,960	26,842	(8,397)	271,517	60,000	211,517	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	1,059,908	0	2,291,325	0	203,795	31,951	27,701	(8,606)	278,271	60,000	218,271	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	1,123,503	0	2,424,335	0	208,279	32,973	28,588	(8,821)	285,199	60,000	225,199	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,190,913	0	2,565,198	0	212,861	34,028	29,503	(9,040)	292,305	60,000	232,305	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,262,368	0	2,714,382	0	217,544	35,117	30,447	(9,266)	299,594	60,000	239,594	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,338,110	0	2,872,381	0	222,330	36,241	31,421	(9,497)	307,071	60,000	247,071	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,418,396	0	3,039,719	0	227,221	37,401	32,426	(9,734)	314,741	60,000	254,741	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	1,503,500	0	3,216,950	0	232,220	38,597	33,464	(9,978)	322,609	60,000	262,609	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,593,710	0	3,404,665	0	237,329	39,833	34,535	(10,227)	330,680	60,000	270,680	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,689,332	0	3,603,485	0	242,550	41,107	35,640	(10,483)	338,959	60,000	278,959	end of 16
											0	3,313,008	388,208	336,576	(129,674)	4,192,804	720,000	3,472,804	

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

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

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

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (9)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	59	6.00 %	IRA	4.00 %	1.00 %	6.00 %	IRA		1,462,000										
initial amount		665,000	100,000	32,000	665,000	32,000	1,462,000												
bonus %		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %												
w/bonus		665,000	100,000	32,000	665,000	32,000	1,462,000												
end of 1	60	704,900	0	104,000	0	32,320	0	704,900	0	1,546,120	0	175,000	0	0	(5,250)	169,750	0	169,750	end of 1
end of 2	61	747,194	0	108,160	0	32,643	0	747,194	0	1,635,191	0	178,850	0	0	(5,365)	173,484	0	173,484	end of 2
end of 3	62	792,025	0	112,486	0	32,970	0	792,025	0	1,729,507	0	182,785	0	0	(5,484)	177,301	0	177,301	end of 3
end of 4	63	839,547	0	116,986	0	33,299	0	839,547	0	1,829,379	0	186,806	0	0	(5,604)	181,202	0	181,202	end of 4
end of 5	64	889,920	0	121,665	0	33,632	0	889,920	0	1,935,137	0	190,916	0	0	(5,727)	185,188	60,000	125,188	end of 5
end of 6	65	943,315	0	126,532	0	33,969	0	943,315	0	2,047,130	0	195,116	30,000	26,010	(8,194)	264,932	60,000	204,932	end of 6
end of 7	66	999,914	0	131,593	0	34,308	0	999,914	0	2,165,729	0	199,408	30,960	26,842	(8,397)	271,517	60,000	211,517	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	0	1,059,908	0	2,291,325	0	203,795	31,951	27,701	(8,606)	278,271	60,000	218,271	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	0	1,123,503	0	2,424,335	0	208,279	32,973	28,588	(8,821)	285,199	60,000	225,199	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,190,913	0	2,565,198	0	212,861	34,028	29,503	(9,040)	292,305	60,000	232,305	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,262,368	0	2,714,382	0	217,544	35,117	30,447	(9,266)	299,594	60,000	239,594	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,338,110	0	2,872,381	0	222,330	36,241	31,421	(9,497)	307,071	60,000	247,071	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,418,396	0	3,039,719	0	227,221	37,401	32,426	(9,734)	314,741	60,000	254,741	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	0	1,503,500	0	3,216,950	0	232,220	38,597	33,464	(9,978)	322,609	60,000	262,609	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,593,710	0	3,404,665	0	237,329	39,833	34,535	(10,227)	330,680	60,000	270,680	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,689,332	0	3,603,485	0	242,550	41,107	35,640	(10,483)	338,959	60,000	278,959	end of 16
											0	3,313,008	388,208	336,576	(129,674)	4,192,804	720,000	3,472,804	

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

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

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:

Planning Horizon: 16 years

Year	401k (6)		ROTH IRA (6)		Savings (6)		401k (8)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Pension (9)	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income	Account	Income											
net return	6.00 %		4.00 %		1.00 %		6.00 %												
initial amount	665,000		100,000		32,000		665,000		1,462,000										
bonus % w/bonus	0.00 %		0.00 %		0.00 %		0.00 %		1,462,000										
end of 1	704,900	0	104,000	0	32,320	0	704,900	0	1,546,120	0	175,000	0	0	0	(5,250)	169,750	0	169,750	end of 1
end of 2	747,194	0	108,160	0	32,643	0	747,194	0	1,635,191	0	178,850	0	0	0	(5,365)	173,484	0	173,484	end of 2
end of 3	792,025	0	112,486	0	32,970	0	792,025	0	1,729,507	0	182,785	0	0	0	(5,484)	177,301	0	177,301	end of 3
end of 4	839,547	0	116,986	0	33,299	0	839,547	0	1,829,379	0	186,806	0	0	0	(5,604)	181,202	0	181,202	end of 4
end of 5	889,920	0	121,665	0	33,632	0	889,920	0	1,935,137	0	190,916	0	0	0	(5,727)	185,188	60,000	125,188	end of 5
end of 6	943,315	0	126,532	0	33,969	0	943,315	0	2,047,130	0	195,116	30,000	26,010	22,000	(8,194)	264,932	60,000	204,932	end of 6
end of 7	999,914	0	131,593	0	34,308	0	999,914	0	2,165,729	0	199,408	30,960	26,842	22,704	(8,397)	271,517	60,000	211,517	end of 7
end of 8	1,059,908	0	136,857	0	34,651	0	1,059,908	0	2,291,325	0	203,795	31,951	27,701	23,431	(8,606)	278,271	60,000	218,271	end of 8
end of 9	1,123,503	0	142,331	0	34,998	0	1,123,503	0	2,424,335	0	208,279	32,973	28,588	24,180	(8,821)	285,199	60,000	225,199	end of 9
end of 10	1,190,913	0	148,024	0	35,348	0	1,190,913	0	2,565,198	0	212,861	34,028	29,503	24,954	(9,040)	292,305	60,000	232,305	end of 10
end of 11	1,262,368	0	153,945	0	35,701	0	1,262,368	0	2,714,382	0	217,544	35,117	30,447	25,753	(9,266)	299,594	60,000	239,594	end of 11
end of 12	1,338,110	0	160,103	0	36,058	0	1,338,110	0	2,872,381	0	222,330	36,241	31,421	26,577	(9,497)	307,071	60,000	247,071	end of 12
end of 13	1,418,396	0	166,507	0	36,419	0	1,418,396	0	3,039,719	0	227,221	37,401	32,426	27,427	(9,734)	314,741	60,000	254,741	end of 13
end of 14	1,503,500	0	173,168	0	36,783	0	1,503,500	0	3,216,950	0	232,220	38,597	33,464	28,305	(9,978)	322,609	60,000	262,609	end of 14
end of 15	1,593,710	0	180,094	0	37,151	0	1,593,710	0	3,404,665	0	237,329	39,833	34,535	29,211	(10,227)	330,680	60,000	270,680	end of 15
end of 16	1,689,332	0	187,298	0	37,523	0	1,689,332	0	3,603,485	0	242,550	41,107	35,640	30,145	(10,483)	338,959	60,000	278,959	end of 16
											3,313,008	388,208	336,576	284,686	(129,674)	4,192,804	720,000	3,472,804	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning Systems

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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.