

Removing an Individual Item on the Manage Scenario Page

09/17/2024 1:44 pm EDT

Within the structured income plan, you can remove an individual account, income, target, and tax from the manage scenario page. Below is a step-by-step guide for removing an individual item.

Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.

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: New Scenario

Planning Horizon: 16 years

Year	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 %											
Initial amount		665,000	100,000	32,000	797,000	0	797,000	0									
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	797,000	0									
end of 1	60	704,900	0	104,000	0	32,320	841,220	0	175,000	0	0	14,400	(3,788)	185,612	0	185,612	end of 1
end of 2	61	747,194	0	108,160	0	32,643	887,997	0	178,850	0	0	19,584	(3,969)	194,465	0	194,465	end of 2
end of 3	62	792,025	0	112,486	0	32,970	937,481	0	182,785	0	0	19,976	(4,055)	198,705	0	198,705	end of 3
end of 4	63	839,547	0	116,986	0	33,299	989,832	0	186,806	0	0	20,375	(4,144)	203,037	0	203,037	end of 4
end of 5	64	889,920	0	121,665	0	33,632	1,045,217	0	190,916	0	0	20,783	(4,234)	207,464	75,000	132,464	end of 5
end of 6	65	943,315	0	126,532	0	33,969	1,103,815	0	195,116	30,000	26,010	21,198	(5,446)	266,878	75,000	191,878	end of 6
end of 7	66	999,914	0	131,593	0	34,308	1,165,815	0	199,408	30,960	26,842	21,622	(5,577)	273,256	75,000	198,256	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	1,231,417	0	203,795	31,951	27,701	22,055	(5,710)	279,792	75,000	204,792	end of 8
end of 9	68	1,123,503	0	142,331	0	34,998	1,300,832	0	208,279	32,973	28,588	22,496	(5,847)	286,489	75,000	211,489	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	1,374,285	0	212,861	34,028	29,503	22,946	(5,987)	293,351	75,000	218,351	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	1,452,014	0	217,544	35,117	30,447	23,405	(6,130)	300,382	75,000	225,382	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	1,534,271	0	222,330	36,241	31,421	23,873	(6,277)	307,587	75,000	232,587	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	1,621,322	0	227,221	37,401	32,426	24,350	(6,428)	314,970	75,000	239,970	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	1,713,451	0	232,220	38,597	33,464	24,837	(6,582)	322,536	75,000	247,536	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	1,810,955	0	237,329	39,833	34,535	25,334	(6,741)	330,290	75,000	255,290	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	1,914,153	0	242,550	41,107	35,640	25,841	(6,903)	338,235	75,000	263,235	end of 16
			0		0			0	3,313,008	388,208	336,576	353,074	(87,817)	4,303,050	900,000	3,403,050	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 2: Edit or Add Scenario: Click on the green Edit or Add Scenario button underneath the Structured Income Planning sub-heading.

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: New Scenario

Planning Horizon: 16 years

Year	401k (€)		ROTH IRA (€)		Savings (€)		Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Renal Income	Approx. Income Tax	After Tax Income	After Tax Target	Income Gap	Year
	Account	Income	Account	Income	Account	Income											
net return	59	6.00 %	IRA	4.00 %		1.00 %											
initial amount		665,000		100,000		32,000	797,000										
bonus % w/bonus		0.00 %		0.00 %		0.00 %	0										
		665,000		100,000		32,000	797,000										
end of 1	60	704,900	0	104,000	0	32,320	841,220	0	175,000	0	0	14,400	(3,788)	185,612	0	185,612	end of 1
end of 2	61	747,194	0	108,160	0	32,643	887,997	0	178,850	0	0	15,584	(3,969)	194,465	0	194,465	end of 2
end of 3	62	792,025	0	112,486	0	32,970	937,481	0	182,785	0	0	16,776	(4,165)	203,037	0	203,037	end of 3
end of 4	63	839,547	0	116,986	0	33,299	989,832	0	186,806	0	0	18,000	(4,372)	211,465	0	211,465	end of 4
end of 5	64	889,920	0	121,665	0	33,632	1,045,217	0	190,916	0	0	19,272	(4,597)	220,037	0	220,037	end of 5
end of 6	65	943,315	0	126,532	0	33,969	1,103,815	0	195,116	30,000	26,010	21,198	(5,446)	228,799	75,000	153,799	end of 6
end of 7	66	999,914	0	131,593	0	34,309	1,165,815	0	199,408	30,960	26,842	21,622	(5,577)	237,756	75,000	162,756	end of 7
end of 8	67	1,059,908	0	136,857	0	34,651	1,231,417	0	203,795	31,951	27,701	22,055	(5,710)	247,192	75,000	172,192	end of 8
end of 9	68	1,123,503	0	142,331	0	34,996	1,300,832	0	208,279	32,973	28,586	22,496	(5,847)	256,989	75,000	181,989	end of 9
end of 10	69	1,190,913	0	148,024	0	35,348	1,374,285	0	212,861	34,028	29,503	22,946	(5,987)	267,102	75,000	192,102	end of 10
end of 11	70	1,262,368	0	153,945	0	35,701	1,452,014	0	217,544	35,117	30,447	23,405	(6,130)	277,672	75,000	202,672	end of 11
end of 12	71	1,338,110	0	160,103	0	36,058	1,534,271	0	222,330	36,241	31,421	23,873	(6,277)	288,595	75,000	213,595	end of 12
end of 13	72	1,418,396	0	166,507	0	36,419	1,621,322	0	227,221	37,401	32,426	24,350	(6,428)	299,970	75,000	224,970	end of 13
end of 14	73	1,503,500	0	173,168	0	36,783	1,713,451	0	232,220	38,597	33,464	24,837	(6,582)	311,892	75,000	236,892	end of 14
end of 15	74	1,593,710	0	180,094	0	37,151	1,810,955	0	237,329	39,833	34,535	25,334	(6,741)	324,325	75,000	249,325	end of 15
end of 16	75	1,689,332	0	187,298	0	37,523	1,914,153	0	242,550	41,107	35,640	25,841	(6,903)	337,225	75,000	262,225	end of 16
			0		0		0		3,313,008	388,208	336,576	353,074	(87,817)	4,303,050	900,000	3,403,050	

Orange backgrounds indicate hypothetical returns

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Step 3: Remove Account: Click on the green Remove button for the individual account you would like to remove.

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 (€) [Replicate] [Remove]
- ROTH IRA (€) [Replicate] [Remove]
- Savings (€) [Replicate] [Remove]

Incomes Also Used In

- Wages (7) [Replicate] [Remove]
- Pension (7) [Replicate] [Remove]
- SS (7) [Replicate] [Remove]
- Income VRBO income [Replicate] [Remove]

Target Also Used In

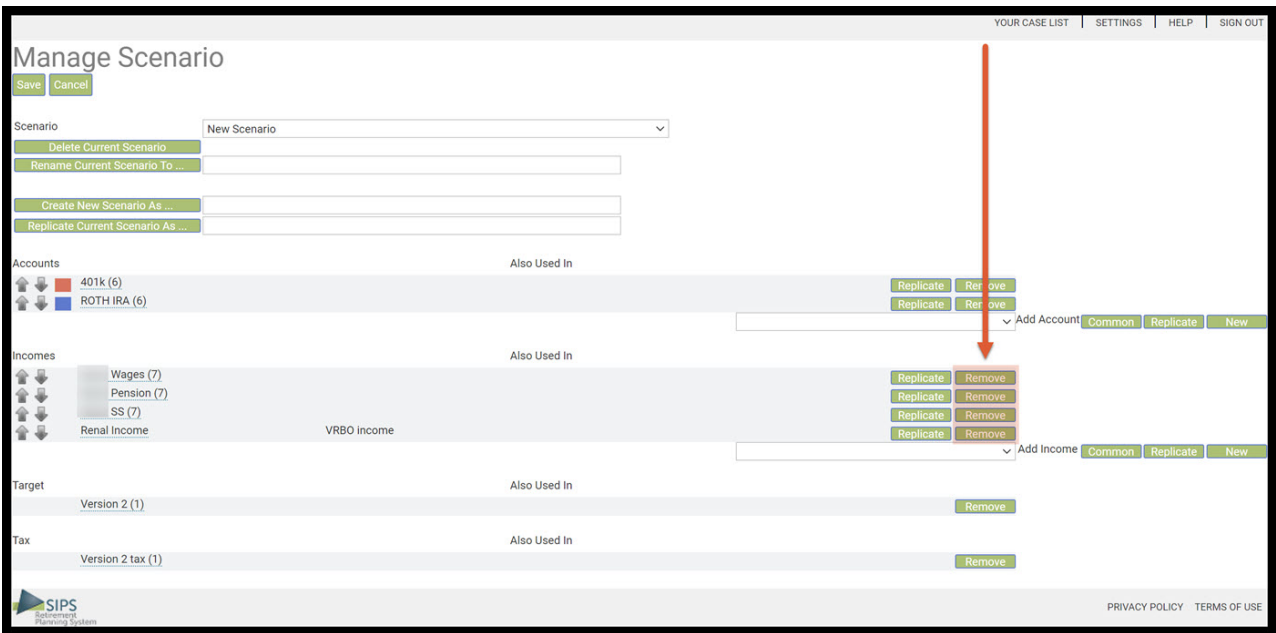
- Version 2 (1) [Remove]

Tax Also Used In

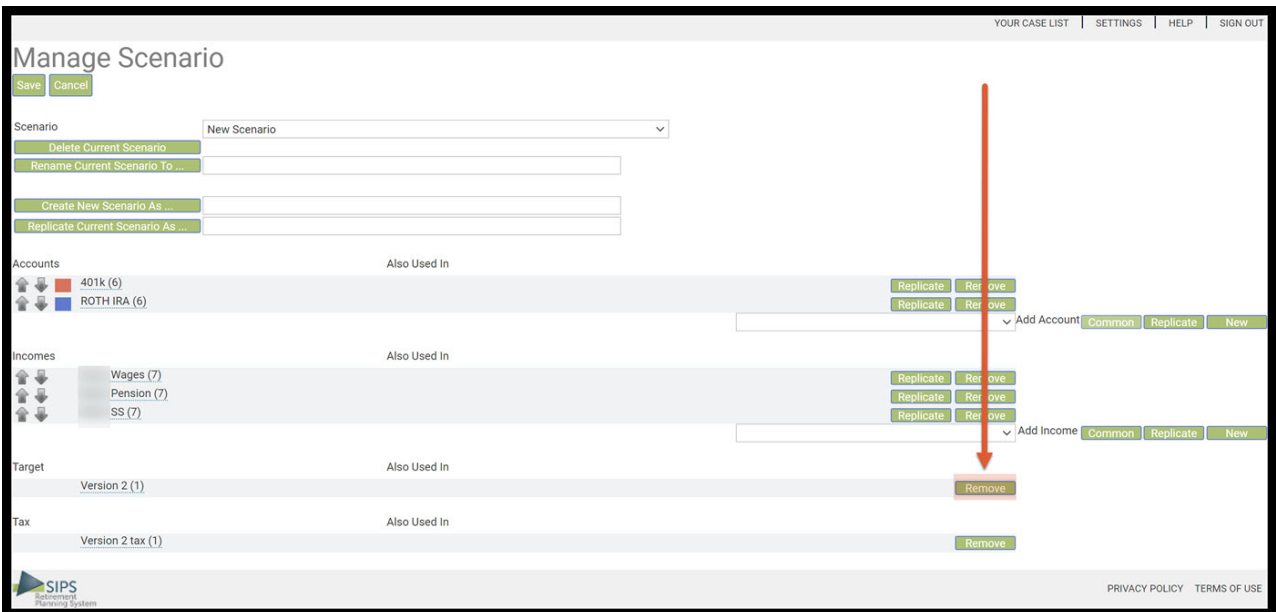
- Version 2 tax (1) [Remove]

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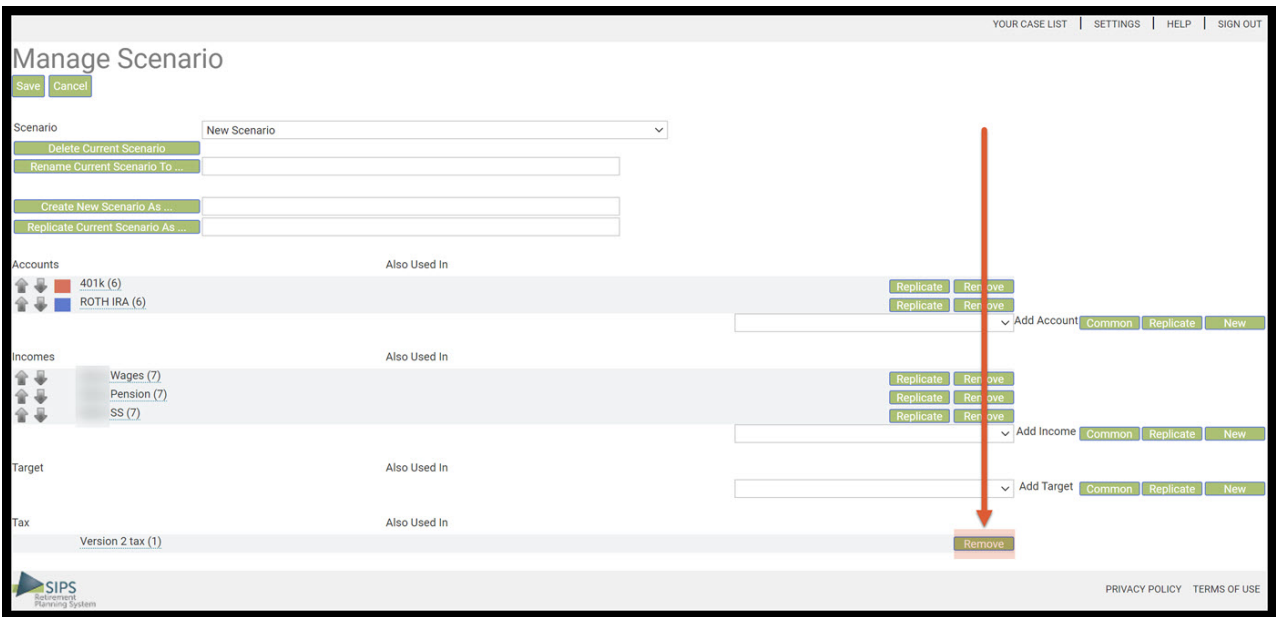
Step 4: Remove Income: Click on the green Remove button for the individual income you would like to remove.



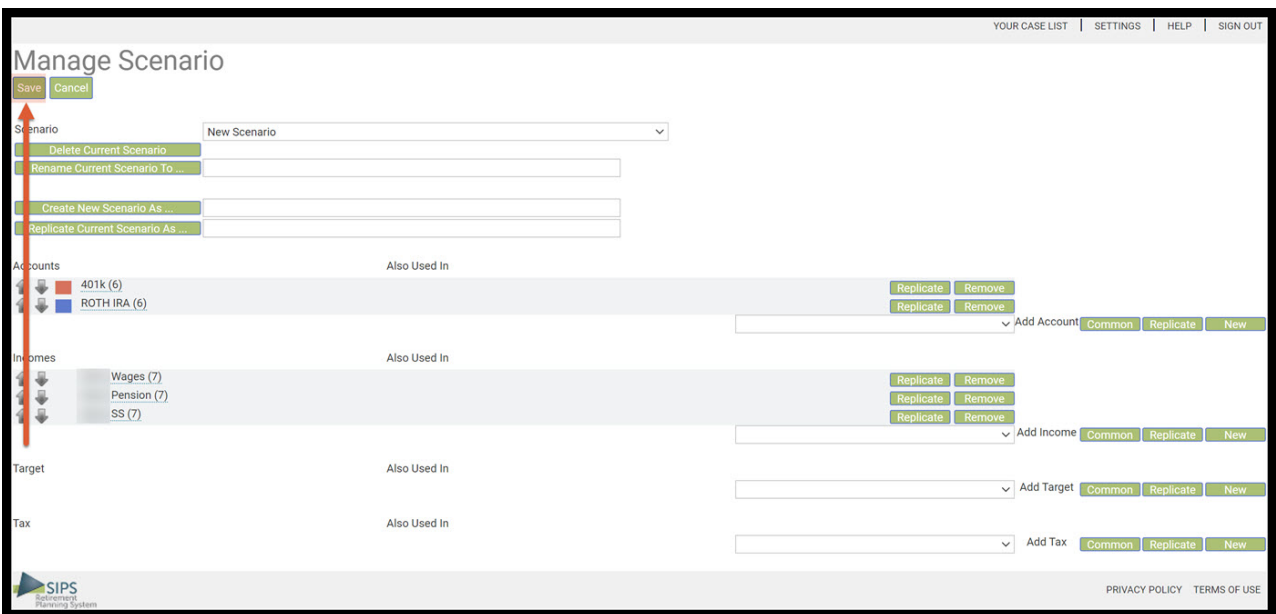
Step 5: Remove Target: Click on the green Remove button for the target you would like to remove.



Step 6: Remove Tax: Click on the green Remove button for the tax you would like to remove.



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



Step 8: Structured Income Plan: The removed items should not be present in the structured income plan.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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Structured Income Planning

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

Scenario:

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %	765,000	Subtotal of account incomes	Manage	Manage	Manage		
initial amount		665,000	100,000		765,000		2.20 %	3.20 %	3.20 %		
bonus % w/bonus		665,000	100,000	Manage	765,000						
end of 1	60	704,900	0	104,000	808,900	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	855,354	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	904,512	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	956,533	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	1,011,585	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	1,069,847	0	195,116	30,000	26,010	251,126	end of 6
end of 7	66	999,914	0	131,593	1,131,507	0	199,408	30,960	26,842	257,211	end of 7
end of 8	67	1,059,908	0	136,857	1,196,765	0	203,795	31,951	27,701	263,447	end of 8
end of 9	68	1,123,503	0	142,331	1,265,834	0	208,279	32,973	28,588	269,840	end of 9
end of 10	69	1,190,913	0	148,024	1,338,937	0	212,861	34,028	29,503	276,392	end of 10
end of 11	70	1,262,368	0	153,945	1,416,313	0	217,544	35,117	30,447	283,108	end of 11
end of 12	71	1,338,110	0	160,103	1,498,213	0	222,330	36,241	31,421	289,992	end of 12
end of 13	72	1,418,396	0	166,507	1,584,904	0	227,221	37,401	32,426	297,048	end of 13
end of 14	73	1,503,500	0	173,168	1,676,668	0	232,220	38,597	33,464	304,281	end of 14
end of 15	74	1,593,710	0	180,094	1,773,804	0	237,329	39,833	34,535	311,696	end of 15
end of 16	75	1,689,332	0	187,298	1,876,630	0	242,550	41,107	35,640	319,297	end of 16
			0		0	0	3,313,008	388,208	336,576	4,037,792	

Orange backgrounds indicate hypothetical returns

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

Scenario:

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year
net return	59	6.00 %	IRA	4.00 %	765,000	Subtotal of account incomes	Manage	Manage	Manage		
initial amount		665,000	100,000		765,000		2.20 %	3.20 %	3.20 %		
bonus % w/bonus		665,000	100,000	Manage	765,000						
end of 1	60	704,900	0	104,000	808,900	0	175,000	0	0	175,000	end of 1
end of 2	61	747,194	0	108,160	855,354	0	178,850	0	0	178,850	end of 2
end of 3	62	792,025	0	112,486	904,512	0	182,785	0	0	182,785	end of 3
end of 4	63	839,547	0	116,986	956,533	0	186,806	0	0	186,806	end of 4
end of 5	64	889,920	0	121,665	1,011,585	0	190,916	0	0	190,916	end of 5
end of 6	65	943,315	0	126,532	1,069,847	0	195,116	30,000	26,010	251,126	end of 6
end of 7	66	999,914	0	131,593	1,131,507	0	199,408	30,960	26,842	257,211	end of 7
end of 8	67	1,059,908	0	136,857	1,196,765	0	203,795	31,951	27,701	263,447	end of 8
end of 9	68	1,123,503	0	142,331	1,265,834	0	208,279	32,973	28,588	269,840	end of 9
end of 10	69	1,190,913	0	148,024	1,338,937	0	212,861	34,028	29,503	276,392	end of 10
end of 11	70	1,262,368	0	153,945	1,416,313	0	217,544	35,117	30,447	283,108	end of 11
end of 12	71	1,338,110	0	160,103	1,498,213	0	222,330	36,241	31,421	289,992	end of 12
end of 13	72	1,418,396	0	166,507	1,584,904	0	227,221	37,401	32,426	297,048	end of 13
end of 14	73	1,503,500	0	173,168	1,676,668	0	232,220	38,597	33,464	304,281	end of 14
end of 15	74	1,593,710	0	180,094	1,773,804	0	237,329	39,833	34,535	311,696	end of 15
end of 16	75	1,689,332	0	187,298	1,876,630	0	242,550	41,107	35,640	319,297	end of 16
			0		0	0	3,313,008	388,208	336,576	4,037,792	

Orange backgrounds indicate hypothetical returns

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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: New Scenario

Planning Horizon: 16 years | 401k (6) | ROTH IRA (6)

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year	
net return	59	6.00 %	IRA	4.00 %								
initial amount	665,000		100,000		765,000	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor			
bonus % w/bonus	0.00 %		0.00 %		765,000		2.20 %	3.20 %	3.20 %			
end of 1	60	704,900	0	104,000	808,900	0	175,000	0	0	175,000	end of 1	
end of 2	61	747,194	0	108,160	855,354	0	178,850	0	0	178,850	end of 2	
end of 3	62	792,025	0	112,486	904,512	0	182,785	0	0	182,785	end of 3	
end of 4	63	839,547	0	116,986	956,533	0	186,806	0	0	186,806	end of 4	
end of 5	64	889,920	0	121,665	1,011,585	0	190,916	0	0	190,916	end of 5	
end of 6	65	943,315	0	126,532	1,069,847	0	195,116	30,000	26,010	251,126	end of 6	
end of 7	66	999,914	0	131,593	1,131,507	0	199,408	30,960	26,842	257,211	end of 7	
end of 8	67	1,059,908	0	136,857	1,196,765	0	203,795	31,951	27,701	263,447	end of 8	
end of 9	68	1,123,503	0	142,331	1,265,834	0	208,279	32,973	28,588	269,840	end of 9	
end of 10	69	1,190,913	0	148,024	1,338,937	0	212,861	34,028	29,503	276,392	end of 10	
end of 11	70	1,262,368	0	153,945	1,416,313	0	217,544	35,117	30,447	283,108	end of 11	
end of 12	71	1,338,110	0	160,103	1,498,213	0	222,330	36,241	31,421	289,992	end of 12	
end of 13	72	1,418,396	0	166,507	1,584,904	0	227,221	37,401	32,426	297,048	end of 13	
end of 14	73	1,503,500	0	173,168	1,676,668	0	232,220	38,597	33,464	304,281	end of 14	
end of 15	74	1,593,710	0	180,094	1,773,804	0	237,329	39,833	34,535	311,696	end of 15	
end of 16	75	1,689,332	0	187,298	1,876,630	0	242,550	41,107	35,640	319,297	end of 16	
			0		0		0	3,313,008	388,208	336,576	4,037,792	

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

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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: New Scenario

Planning Horizon: 1 years | 401k (6) | ROTH IRA (6)

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year	
net return	59	6.00 %	IRA	4.00 %								
initial amount	665,000		100,000		765,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor			
bonus % w/bonus	0.00 %		0.00 %		765,000		2.20 %	3.20 %	3.20 %			
end of 1	60	704,900	0	104,000	808,900	0	175,000	0	0	175,000	end of 1	
end of 2	61	747,194	0	108,160	855,354	0	178,850	0	0	178,850	end of 2	
end of 3	62	792,025	0	112,486	904,512	0	182,785	0	0	182,785	end of 3	
end of 4	63	839,547	0	116,986	956,533	0	186,806	0	0	186,806	end of 4	
end of 5	64	889,920	0	121,665	1,011,585	0	190,916	0	0	190,916	end of 5	
end of 6	65	943,315	0	126,532	1,069,847	0	195,116	30,000	26,010	251,126	end of 6	
end of 7	66	999,914	0	131,593	1,131,507	0	199,408	30,960	26,842	257,211	end of 7	
end of 8	67	1,059,908	0	136,857	1,196,765	0	203,795	31,951	27,701	263,447	end of 8	
end of 9	68	1,123,503	0	142,331	1,265,834	0	208,279	32,973	28,588	269,840	end of 9	
end of 10	69	1,190,913	0	148,024	1,338,937	0	212,861	34,028	29,503	276,392	end of 10	
end of 11	70	1,262,368	0	153,945	1,416,313	0	217,544	35,117	30,447	283,108	end of 11	
end of 12	71	1,338,110	0	160,103	1,498,213	0	222,330	36,241	31,421	289,992	end of 12	
end of 13	72	1,418,396	0	166,507	1,584,904	0	227,221	37,401	32,426	297,048	end of 13	
end of 14	73	1,503,500	0	173,168	1,676,668	0	232,220	38,597	33,464	304,281	end of 14	
end of 15	74	1,593,710	0	180,094	1,773,804	0	237,329	39,833	34,535	311,696	end of 15	
end of 16	75	1,689,332	0	187,298	1,876,630	0	242,550	41,107	35,640	319,297	end of 16	
			0		0		0	3,313,008	388,208	336,576	4,037,792	

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.

Structured Income Planning

Edit Dynamic Mode

Scenario

Planning Horizon		401k (6)		ROTH IRA (6)											
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (7)	Pension (7)	SS (7)	Total Income	Year			
net return	59	6.00 %	IRA	4.00 %		765,000									
initial amount		665,000		100,000		765,000	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor					
bonus % w/bonus		0.00 %		0.00 %				2.20 %	3.20 %	3.20 %					
end of 1	60	704,900	0	104,000	0	808,900	0	175,000	0	0	175,000	end of 1			
end of 2	61	747,194	0	108,160	0	855,354	0	178,850	0	0	178,850	end of 2			
end of 3	62	792,025	0	112,486	0	904,512	0	182,785	0	0	182,785	end of 3			
end of 4	63	839,547	0	116,986	0	956,533	0	186,806	0	0	186,806	end of 4			
end of 5	64	889,920	0	121,665	0	1,011,585	0	190,916	0	0	190,916	end of 5			
end of 6	65	943,315	0	126,532	0	1,069,847	0	195,116	30,000	26,010	251,126	end of 6			
end of 7	66	999,914	0	131,593	0	1,131,507	0	199,408	30,960	26,842	257,211	end of 7			
end of 8	67	1,059,908	0	136,857	0	1,196,765	0	203,795	31,951	27,701	263,447	end of 8			
end of 9	68	1,123,503	0	142,331	0	1,265,834	0	208,279	32,973	28,588	269,840	end of 9			
end of 10	69	1,190,913	0	148,024	0	1,338,937	0	212,861	34,028	29,503	276,392	end of 10			
end of 11	70	1,262,368	0	153,945	0	1,416,313	0	217,544	35,117	30,447	283,108	end of 11			
end of 12	71	1,338,110	0	160,103	0	1,498,213	0	222,330	36,241	31,421	289,992	end of 12			
end of 13	72	1,418,396	0	166,507	0	1,584,904	0	227,221	37,401	32,426	297,048	end of 13			
end of 14	73	1,503,500	0	173,168	0	1,676,668	0	232,220	38,597	33,464	304,281	end of 14			
end of 15	74	1,593,710	0	180,094	0	1,773,804	0	237,329	39,833	34,535	311,696	end of 15			
end of 16	75	1,689,332	0	187,298	0	1,876,630	0	242,550	41,107	35,640	319,297	end of 16			
			0		0		0	3,313,008	388,208	336,576	4,037,792				

Orange backgrounds indicate hypothetical returns



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.