Adding an Income to Start at a Specified Age

09/17/2024 1:08 pm EDT

Within the structured income plan, you have the ability to add an income to start at a certain age. Below are the step-by-step guidelines to adding an income to start at a specified age.

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

															EPARED BY:	
IENT DASHBOA	RD STRU	ICTURED INCOM	ME PLANNING	CASH FLO	W AND TAX A		SSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS 1	OOLS			PLAN DATE: PLAN DATE:	
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tructu		ncome	e Plar	ning												
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enario New	Scenario (1)						~									
nning rizon	l6 years ∽	401	lk (7)	ROTH	IRA (7)	Savi	ngs (9)									
12011										_						
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	(3)	Pension (3)	Total Income	Year		
net return	59	6.00 %	IRA	4.00 %		1.00 %		222200000			2.05	(3)				
tial amount bonus %		665,000 0.00 %		100,000 0.00 %		32,000 0.00 %		797,000	Subtotal of account	Infl Factor	Infl Factor	Infl Factor				
w/bonus		665,000		100.000		32.000		797.000	incomes	2.20 %	3.20 %	3.20 %				
end of 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0	0	175,000	end of 1		
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	178,850	end of 2		
end of 3	62 63	792,025	0	112,486	0	32,970	0	937,481	0	182,785	0	0	182,785	end of 3		
end of 4 end of 5	64	839,547 889,920	0	116,986 121,665	0	33,299 33,632	0	989,832 1,045,217	0	186,806 190,916	0	0	186,806 190,916	end of 4 end of 5		
end of 6	65	943,315	0	126,532	0	33,969	0	1,103,815	0	0	26.010	30,000	56,010	end of 6		
end of 7	66	999,914	0	131,593	Ő	34,308	0	1,165,815	0	0	26,842	30,960	57,802	end of 7		
end of 8	67	1,059,908	0	136,857	0	34,651	0	1,231,417	0	0	27,701	31,951	59,652	end of 8		
end of 9	68	1,123,503	0	142,331	0	34,998	0	1,300,832	0	0	28,588	32,973	61,561	end of 9		
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,374,285	0	0	29,503	34,028	63,531	end of 10		
end of 11 end of 12	70 71	1,262,368 1,338,110	0	153,945 160,103	0	35,701 36,058	0	1,452,014 1,534,271	0	0	30,447 31,421	35,117 36,241	65,564 67,662	end of 11 end of 12		
end of 12 end of 13	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	0	31,421 32,426	36,241 37,401	69,827	end of 12 end of 13		
end of 14	73	1,503,500	0	173.168	0	36,783	0	1,713,451	o o	0	33,464	38,597	72,061	end of 13		
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,810,955	0	0	34,535	39,833	74,367	end of 15		
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,914,153	0	0	35,640	41,107	76,747	end of 16		
121 1			0		0		0		0	914,356	336,576	388,208	1,639,140			
Orange bag	ckgrounds ind	licate hypothe	etical returns													

Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning heading.

				1											PREPARED INITIAL PLAN D	ATE:	
LIENT DASHBO	ARD STRU	ICTURED INCOM	IE PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	FION AND NET	WORTH C	RAPHS R	EPORTS 1	OOLS			REVISED PLAN D	ATE:	
truct	ired Ir	ncome	Plan	nina													
		ccount Add			dd Target	dit or Add Sc	enario Dier	lay Options									
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	16 years 🗸	401	(7)	POTH	IRA (7)	Saui	ngs (9)										
orizon		401	(/)	KOTH	IKA (7)	Savi	ngs (9)										
Year	1000	Account	Income	Account	Income	Account	Income	Accounts	Planned	1000	SS	Pension	Total	Year			
00040002		0.000.000.00000		0.000002000		10100000000000		Total	Distribution	Wages (3)	(3)	(3)	Income				
net return itial amount	59	6.00 % 665,000	IRA	4.00 %		1.00 % 32,000		797,000	Subtotal								
bonus %		0.00 %		0.00 %		0.00 %		/97,000	of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor					
w/bonus		665,000	Manage	100,000	Manage	32,000	Manage	797,000	incomes	2.20 %	3.20 %	3.20 %					
end of 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0	0	175,000	end of 1			
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	178,850	end of 2			
end of 3	62	792,025	0	112,486	0	32,970	0	937,481	0	182,785	0	0	182,785	end of 3			
end of 4	63	839,547	0	116,986	0	33,299	0	989,832	0	186,806	0	0	186,806	end of 4			
end of 5	64	889,920	0	121,665	0	33,632	0	1,045,217	0	190,916	0	0	190,916	end of 5			
end of 6 end of 7	65 66	943,315 999,914	0	126,532 131,593	0	33,969 34,308	0	1,103,815	0	0	26,010 26,842	30,000 30,960	56,010 57,802	end of 6 end of 7			
end of 8	67	1.059.908	0	136,857	0	34,508	0	1,231,417	0	0	27,701	31,951	59,652	end of 8			
end of 9	68	1,123,503	Ő	142,331	0	34,998	0	1,300,832	0	0	28,588	32,973	61,561	end of 9			
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,374,285	0	0	29,503	34,028	63,531	end of 10			
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	0	30,447	35,117	65,564	end of 11			
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	0	31,421	36,241	67,662	end of 12			
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,621,322	0	0	32,426	37,401	69,827	end of 13			
end of 14 end of 15	73 74	1,503,500	0	173,168 180,094	0	36,783	0	1,713,451 1,810,955	0	0	33,464 34,535	38,597	72,061 74,367	end of 14			
end of 15 end of 16	74	1,593,710	0	180,094	0	37,151 37,523	0	1,810,955	0	0	34,535	39,833 41,107	76,747	end of 15 end of 16			
end of 10	, s	1,009,002	0	107,290	0	07,020	0	1,214,100	0	914,356	336,576	388,208	1,639,140				
	-	licate hypothet	Vicel returns														

Step 3: Other Income Name: Type in a title for the other income name.

			TOUR CASE LIS	I SETTINGS HELP S	SIGN OUT
Manage Income save Cancel				Income Adjustments	
Other income name	Yearly gift				
This is a Social Security income		ADD ADJUSTMENT	Year 1 2	Income adjustment	-
First year income		Pick year(s)	3 4		
Inflation rate	0.0 %		5		
Number of months of income in first year	12.0	Pick year(s) to remove	7 8		
Income description		Reset all years	9 10		
Delay the income start until age Age to begin income	0 OClient 1 age Client 2 age		11 12 13		
Tax calculation option	Not Taxable ~		14 15 16		
			17		
			19 20		
			21		
			22 23 24		+
			4		•
Orange backgrounds indicate hypothet	ical returns	Note that entered value	s WILL roll down	n to following years when blank	
SIPS Retirement Planning System				PRIVACY POLICY TERMS	S OF USE

Step 4: Social Security Income: Leave the box unchecked.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Yearly gift	ADD ADJUSTMENT	Year	Income Adjustments	4
This is a Social Security income					
First year income		Pick year(s)	3		
Inflation rate	0.0 %	Pick year(s) to remove	5 6		
Number of months of income in first year	12.0		7 8		
Income description		Reset all years	9 10		
Delay the income start until age	0		11		
Age to begin income	0 Client 1 age O Client 2 age		13		
Tax calculation option	Not Taxable ~		14 15 16		
			17		
			18		
			20		
			21		
			23		
			4 24		• •
Orange backgrounds indicate hypothet	ical returns	Note that entered value	s WILL roll down	to following years when blan	k
SIPS Retrement Ptanning System				PRIVACY POLICY TER	MS OF USE

Step 5: First Year Income: Type in the numeric amount of income for the first year.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Yearly gift			income Adjustments	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment	^
First year income	18,000	Pick year(s)	3		- 1
Inflation rate	0.0	Pick year(s) to remove	5 6		- 1
Number of months of income in first year	12.0	This year by to remove	7		- 1
Income description		Reset all years	9 10		- 1
Delay the income start until age Age to begin income	0 O Client 1 age		11 12 13		
Tax calculation option	Not Taxable ~		14 15 16		
			17		
			19 20 21		
			22		
			~ 24 4		+
Orange backgrounds indicate hypothe	tical returns	Note that entered value	es WILL roll down to	following years when blar	ık
SIPS Retirement Planning System				PRIVACY POLICY TE	RMS OF USE

Step 6: Inflation Rate: Type in the inflation rate.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Yearly gift			Income Adjustments	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment	^
First year income	18,000	Pick year(s)	3 4		
Inflation rate	0.0 %	Pick year(s) to remove	5 6		- 1
Number of months of income in first year	12.0	Pick year(s) to remove	7 8		- 1
Income description		Reset all years	9 10		- 1
Delay the income start until age			11 12		- 1
Age to begin income	0 Olient 1 age Client 2 age		13 14		
Tax calculation option	Not Taxable V		15 16		
			17		
			19		
			21		
			22 23		+
			4 24		
Orange backgrounds indicate hypother	tical returns	Note that entered value	s WILL roll down to	o following years when blan	k
Retrement Flanning System				PRIVACY POLICY TER	RMS OF USE

Step 7: Number of Months of Income in First Year: Type in the number of months of income in the first year. The default amount is set a 12.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Yearly gift			Income Adjustments	
This is a Social Security income		ADD ADJUSTMENT	Year 1 2	Income adjustment	-
First year income	18,000	Pick year(s)	3 4		- 1
Inflation rate	0.0 %	Pick year(s) to remove	5 6		- 1
Number of months of income in first year	12.0		7		
Income description		Reset all years	9 10		- 1
Delay the income start until age Age to begin income	0 Client 1 age Client 2 age		11 12 13		
Tax calculation option	Not Taxable ~		14 15 16		- 1
			17 18 19		
			20 21		
			22 23 24		
		9531942 (J. 6. 6. 11.))
Orange backgrounds indicate hypothet	ical returns	Note that entered value:	s WILL roll down to	o following years when blar PRIVACY POLICY TE	

Step 8: Income Description: Type in the income description.

				YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income						
Other income name	Yearly gift		ADD ADJUSTMENT	Year	Income Adjustments	4
This is a Social Security income						
First year income	18,000		Pick year(s)	3		- 1
Inflation rate	0.0 %		P. 1	5		- 1
Number of months of income in first year	12.0		Pick year(s) to remove	7		- 1
Income description	Yearly Inheritance gift		Reset all years	9 10		- 1
Delay the income start until age Age to begin income	0 OClient 1 age Client 2 age			11 12 13		
Tax calculation option	Not Taxable 🗸			14 15 16		- 1
				17		
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				21		
				23		-
				4		
Orange backgrounds indicate hypothet	lical returns		Note that entered value	es WILL roll down t	o following years when blar	
Retirement Planning System						

Step 9: Delay the Income Start Until Age: Click on the text box.

		YOUR CASE LIST SETTINGS	HELP SIGN OUT
Manage Income			
Other income name	Yearly gift	Income Adjustmen	
This is a Social Security income	0	ADD ADJUSTMENT Year Income adjus	tment
First year income	18,000	Pick year(s) 3	
Inflation rate	0.0 %	Pick year(s) to remove	
Number of months of income in first year	12.0		
Income description	Yearly Inheritance gift	Reset all years 10	
Delay the income start until age			
Age to begin income	0 Client 1 age O Client 2 age	13	
-		14	
Tax calculation option	Not Taxable ~	15	
		17	
		18	
		19	
		20	
		21	
		23	*
		4	
Orange backgrounds indicate hypothe	ical returns	Note that entered values WILL roll down to following years w	hen blank
SIPS Retrement Planning System		PRIVACY POL	ICY TERMS OF USE

Step 10: Age to Begin Income: Type in the numerical age to begin income.

					_
			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income Save Cancel					
Other income name				Income Adjustments	
Other income name	Yearly gift	ADD ADJUSTMENT	Year	Income adjustment	
This is a Social Security income	0			moome asyaamen	
First year income	18,000	Pick year(s)	3 4		
Inflation rate	0.0 %	Pick year(s) to remove	5 6		
Number of months of income in first year	12.0		8		
Income description	Yearly Inheritance gift	Reset all years			
Delay the income start until age			12		
Age to begin income	65 65 0Earth or 0 0Earth or		13		
Tax calculation option	Not Taxable V		14 15		
			16 17		
			18		
			19		
			20		
			21		
1			23		
			24		• •
			1		
Orange backgrounds indicate hypothet	rical returns	Note that entered value	es WILL roll down t	to following years when blan	ik
SIPS Retirement Planing System				PRIVACY POLICY TER	MS OF USE

Step 11: Radio Buttons: Click which radio button the income is associated with. The default is set with Client 1.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income Save Cancel					
Other income name	Yearly gift	ADD ADJUSTMENT	Year	Income Adjustments	
This is a Social Security income		ADD ADJOSTMENT	1 2	income adjustment	Â
First year income	18,000	Pick year(s)	3 4		- 1
Inflation rate	0.0 %	Pick year(s) to remove	5 6		- 1
Number of months of income in first year	12.0		7 8 9		- 1
Income description	Yearly Inheritance gift	Reset all years	10		- 1
Delay the income start until age Age to begin income			12		
Age to begin income	65 Olient 1 age Olient 2 age		13 14		- 1
Tax calculation option	Not Taxable 🗸		15		
			16 17		
			18		
			19		
			20		
			21		
			23		
			24		•
					,
Orange backgrounds indicate hypothe	tical returns	Note that entered value	s WILL roll down	to following years when blan	k
SIPS Retirement				PRIVACY POLICY TER	MS OF USE

Step 12: Tax Calculation Option: In the text box, click on the down carrot arrow and select which tax option this income will be.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Yearly gift	ADD ADJUSTMENT		Income Adjustments	
This is a Social Security income	0	ADUADUSIMEN	Year 1 2	Income adjustment	Â
First year income	18,000	Pick year(s)	3 4		
Inflation rate	0.0	Pick year(s) to remove	5 6		
Number of months of income in first year	12.0				
Income description	Yearly Inheritance gift	Reset all years	10		
Delay the income start until age Age to begin income	65 Client 1 age Client 2 age		12 13		
Tax calculation option	Not Taxable		14 15		
	†		16 17 18		
			19		
			21 22		
			23 74		+
Orange backgrounds indicate hypothet	ical returns	Note that entered value	s WILL roll down t	o following years when blank	
Retirement Planning System				PRIVACY POLICY TERM	IS OF USE

Step 13: Save: Click the green save button underneath the add income subheading.

			YOUR CASE LIST	SETTINGS H	IELP	SIGN OUT
Manage Income						
Oti er income name	Yearly gift			Income Adjustment	S	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjusti	nent	^
Fir t year income	18,000	Pick year(s)	3			
Inf ation rate	0.0 %		5			
Number of months of income in first year	12.0	Pick year(s) to remove	7			
Income description	Yearly Inheritance gift	Reset all years	9 10			
Deay the income start until age	\mathbb{N}		11 12			
Age to begin income	65 Client 1 age Client 2 age		13			
Tax calculation option	Not Taxable ~		15			
			17			
			19			
			21			
			23			+
			- 24 4			÷
Orange backgrounds indicate hypothe	tical returns	Note that entered value	s WILL roll down t	o following years wh	en blanl	k
SIPS Retirement				PRIVACY POLI	CY TER	MS OF USE

Step 14: Structured Income Planning Page: The new income should have a separate column in the structured income plan.

															INI	PREPARED BY: FIAL PLAN DATE:	
IENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS 1	TOOLS			REVI	SED PLAN DATE:	
struct	ured li	ncom	e Plar	nnina													
	ancel Add A				dd Target	Edit or Add Sc	enario Disr	ay Options									
النتينا ا																	
cenario Nev	v Scenario (1)						~										
lanning	16 years ∨							1									
orizon	io jeuro	401	1k (7)	ROTH	I IRA (7)	Savi	ngs (9)										
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	(3) SS	Pension (3)	Yearly gift	Total Income	Year		
net return	59	6.00 %	IRA	4.00 %		1.00 %											
nitial amount		665,000		100,000		32,000		797,000	Subtotal	Manage	Manage	Manage	Manage				
bonus % w/bonus		0.00 %	Manage	0.00 %	Manage	0.00 % 32.000	Manage	0 797,000	of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %	Infl Factor 0.00 %				
end of 1	60	704,900	Manage 0	104,000	Manage 0	32,320	- Manage 0	841,220	0	175.000	0.20 10	0.20 10	0.00 0	175.000	end of 1		
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	0	178,850	end of 2		
end of 3	62	792,025	0	112,486	0	32,970	0	937,481	0	182,785	0	0	0	182,785	end of 3		
end of 4	63	839,547	0	116,986	0	33,299	0	989,832	0	186,806	0	0	0	186,806	end of 4		
end of 5	64	889,920	0	121,665	0	33,632	0	1,045,217	0	190,916	0	0	0	190,916	end of 5		
end of 6 end of 7	65 66	943,315 999,914	0	126,532 131,593	0	33,969 34,308	0	1,103,815 1,165,815	0	0	26,010 26,842	30,000 30,960	18,000 18,000	74,010 75,802	end of 6 end of 7		
end of 8	67	1.059.908	0	131,593	0	34,308	0	1,105,815	0	0	26,842	30,960	18,000	75,802	end of 7 end of 8		
end of 9	68	1,123,503	0	142.331	0	34,998	0	1.300.832	0	0	28,588	32,973	18,000	79,561	end of 9		
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,374,285	0	0	29,503	34,028	18,000	81,531	end of 10		
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	0	30,447	35,117	18,000	83,564	end of 11		
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	0	31,421	36,241	18,000	85,662	end of 12		
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,621,322	0	0	32,426	37,401	18,000	87,827	end of 13		
end of 14 end of 15	73 74	1,503,500	0	173,168	0	36,783	0	1,713,451	0	0	33,464	38,597	18,000	90,061	end of 14		
	74	1,593,710	0	180,094 187,298	0	37,151 37,523	0	1,810,955	0	0	34,535 35.640	39,833 41,107	18,000 18,000	92,367 94,747	end of 15 end of 16		
	15	1,009,332	0	107,298	0	37,323	0	1,914,153	0	914.356	35,640	388,208	198,000	94,747	enuorio		
end of 15 end of 16																	

Step 15: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

														YOUR	CASE LIST	SETTINGS HE	P SIGN OUT
															1010	PREPARED BY:	
CLIENT DASH	IBOARD ST	RUCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS 1	OOLS				TIAL PLAN DATE: SED PLAN DATE:	
01	1		DI														
Struc	tured																
Edit Save	Cancel Add	Account Add	d Income A	dd Inc Tax 🛛 A	dd Target	Edit or Add So	enario Disp	lay Options									
Scenario	0						~										
Scenario P	lew Scenario (1)					~										
- I																	
Planning		-						ř									
Horizon	16 years ∨	40	1k (7)	ROTH	I IRA (7)	Savi	ngs (9)										
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	(3) SS	Pension (3)	Yearly gift	Total Income	Year		
net re um		6.00 %	IRA	4.00 %		1.00 %		707.000	C. hund								
initial ar ou bonu %	nt	665,000 0.00 %		100,000 0.00 %		32,000 0.00 %		797,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor				
w/bo us		665,000	Manage	100,000	Manage	32,000	Manage	797,000	incomes	2.20 %	3.20 %	3.20 %	0.00 %				
end c 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0	0	0	175,000	end of 1		
end c 2 end c 3	61 62	747,194 792.025	0	108,160 112,486	0	32,643 32,970	0	887,997 937,481	0	178,850 182,785	0	0	0	178,850 182,785	end of 2 end of 3		
end c 4	63	839,547	0	116,986	0		0	989,832	0	186,806	0	0	0	186,806	end of 4		
end c 5	64	889,920	0	121,665	0	33,632	0	1,045,217	0	190,916	0	0	0	190,916	end of 5		
end c 6	65	943,315	0	126,532	0	33,969	0	1,103,815	0	0	26,010	30,000	18,000	74,010	end of 6		
end c 7	66	999,914	0	131,593	0	34,308	0	1,165,815	0	0	26,842	30,960	18,000	75,802	end of 7		
end c 8 end c 9	67 68	1,059,908 1,123,503	0	136,857 142,331	0	34,651 34,998	0	1,231,417 1,300,832	0	0	27,701 28,588	31,951 32,973	18,000 18,000	77,652 79,561	end of 8 end of 9		
end o 10		1,123,503	0	142,331	0	34,998	0	1,300,832	0	0	28,588	34,028	18,000	81,531	end of 9 end of 10		
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	0	30,447	35,117	18,000	83,564	end of 11		
end of 12		1,338,110	0	160,103	0	36,058	0	1,534,271	0	0	31,421	36,241	18,000	85,662	end of 12		
end of 13		1,418,396	0	166,507	0	36,419	0	1,621,322	0	0	32,426	37,401	18,000	87,827	end of 13		
end of 14 end of 15	73	1,503,500 1,593,710	0	173,168 180,094	0	36,783 37,151	0	1,713,451 1,810,955	0	0	33,464 34,535	38,597 39,833	18,000 18,000	90,061 92,367	end of 14 end of 15		
end of 16		1,689,332	0	180,094	0	37,131	0	1,914,153	0	0	34,535	41,107	18,000	92,367	end of 15 end of 16		
010 01 10	1 / /	1,005,002	0	107,290	0	07,020	0	1,714,100	0	914,356	336,576	388,208	198,000	1,837,140			
Orange	backgrounds i	ndicate hypoth	etical returns														
																PRIVACY POLICY	TERMS OF USE
Retirement	stem															PRIVACT POLICY	TERMS OF USE

Step 16: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.

ENT DASHBO	ARD STR	UCTURED INCO	ME PLANNING	CASH FU	OW AND TAX A		SSET ALLOCA	TION AND NET	WORTH L		FPORTS 1 T	0015				PREPARED BY: TIAL PLAN DATE: ISED PLAN DATE:	
						-	SOLT TILLE OF					0020			REV	ISED PLAN DATE:	
ructi	ured I	ncom	e Plar	nning													
Dynamic	Mode			0													
nario Nev	v Scenario (1)						~										
THE	rocentario (1)																
ning	16 years ∨		and the second														
ton		40	1k (7)	ROTH	I IRA (7)	Savi	ngs (9)										
253			28	R 8	2		0.00	Accounts	Planned		SS		1001 12 1003	Total	122		
Year		Account	Income	Account	Income	Account	Income	Total	Distribution	Wages (3)	(3)	Pension (3)	Yearly gift	Income	Year		
et return	59	6.00 %	IRA	4.00 %		1.00 %	-		~		1.4	(0)					
al amount		665,000	1000	100,000		32,000		797,000	Subtotal								
onus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor				
/bonus nd of 1	60	665,000 704,900	0	100,000	0	32,000 32,320	0	797,000 841,220	incomes 0	2.20 %	3.20 %	3.20 %	0.00 %	175,000	end of 1		
nd of 2	61	747,194	0	104,000	0	32,520	0	887,997	0	178,850	0	0	0	178,850	end of 2		
nd of 3	62	792,025	0	112,486	ő	32,970	0	937,481	0	182,785	0	0	0	182,785	end of 3		
nd of 4	63	839,547	0	116,986	0	33,299	0	989,832	0	186,806	0	0	0	186,806	end of 4		
nd of 5	64	889,920	0	121,665	0	33,632	0	1,045,217	0	190,916	0	0	0	190,916	end of 5		
nd of 6	65	943,315	0	126,532	0	33,969	0	1,103,815	0	0	26,010	30,000	18,000	74,010	end of 6		
nd of 7	66 67	999,914	0	131,593	0	34,308	0	1,165,815	0	0	26,842	30,960 31,951	18,000	75,802	end of 7		
nd of 8 nd of 9	68	1,059,908 1,123,503	0	136,857 142,331	0	34,651 34,998	0	1,231,417 1,300,832	0	0	27,701 28,588	31,951	18,000 18,000	77,652 79,561	end of 8 end of 9		
nd of 10	69	1,123,503	0	148,024	0	35,348	0	1,374,285	0	0	29,503	34.028	18,000	81,531	end of 10		
d of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	0	30,447	35,117	18,000	83,564	end of 11		
nd of 12	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	0	31,421	36,241	18,000	85,662	end of 12		
nd of 13	72	1,418,396	0	166,507	0	36,419	0	1,621,322	0	0	32,426	37,401	18,000	87,827	end of 13		
nd of 14	73	1,503,500	0	173,168	0	36,783	0	1,713,451	0	0	33,464	38,597	18,000	90,061	end of 14		
nd of 15	74	1,593,710	0	180,094 187,298	0	37,151	0	1,810,955	0	0	34,535 35,640	39,833 41,107	18,000	92,367	end of 15		
nd of 16	/5	1,689,332	0	187,298	0	37,523	0	1,914,153	0	0 914.356	35,640	41,107	18,000	94,747 1.837.140	end of 16		
					0		0		0	214,330	000,070	000,200	190,000	1,037,140			

Step 17: 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 O
CLIENT DASHBOAF	RD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	dvisor a	SSET ALLOCA	TION AND NET	WORTH (SRAPHS R	EPORTS 1	OOLS				PREPARED BY: TIAL PLAN DATE: ISED PLAN DATE:	
Structu	red li	ncom	o Plar	nnina													
Edit Save Car		Account Add			dd Target	dit or Add So	onario Dier	lay Options									
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Scenario New S	cenario (1)						~										
Planning	years ∽							ř									
Horizon	years +	401	1k (7)	ROTH	I IRA (7)	Savi	ngs (9)										
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	(3) SS	Pension (3)	Yearly gift	Total Income	Year		
net return	59	6.00 %	IRA	4.00 %		1.00 %											
initial amount bonus %		665,000 0.00 %		100,000 0.00 %		32,000 0.00 %		797,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor				
w/bonus		665,000	Manage	100,000	Manage	32,000	Manage	797,000	incomes	2.20 %	3.20 %	3.20 %	0.00 %				
end of 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0	0	0	175,000	end of 1		
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	0	178,850	end of 2		
end of 3	62 63	792,025	0	112,486	0	32,970	0	937,481	0	182,785	0	0	0	182,785	end of 3		
end of 4 end of 5	64	839,547 889,920	0	116,986 121,665	0	33,299 33,632	0	989,832 1,045,217	0	186,806 190,916	0	0	0	186,806 190,916	end of 4 end of 5		
end of 6	65	943,315	0	126,532	0	33,969	0	1,103,815	0	190,910	26,010	30,000	18,000	74,010	end of 6		
end of 7	66	999.914	0	131,593	0	34,308	0	1,165,815	0	0	26,842	30,960	18,000	75,802	end of 7		
end of 8	67	1,059,908	0	136,857	0	34,651	0	1,231,417	0	0	27,701	31,951	18,000	77,652	end of 8		
end of 9	68	1,123,503	0	142,331	0	34,998	0	1,300,832	0	0	28,588	32,973	18,000	79,561	end of 9		
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,374,285	0	0	29,503	34,028	18,000	81,531	end of 10		
end of 11 end of 12	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	0	30,447	35,117	18,000	83,564	end of 11		
end of 12 end of 13	71 72	1,338,110 1,418,396	0	160,103 166,507	0	36,058 36,419	0	1,534,271 1,621,322	0	0	31,421 32,426	36,241 37,401	18,000 18,000	85,662 87,827	end of 12 end of 13		
end of 14	73	1,418,396	0	173,168	0	36,419	0	1,021,322	0	0	33,464	38,597	18,000	90,061	end of 13 end of 14		
end of 15	74	1,593,710	0	180,094	0	37,151	0	1,810,955	0	0	34,535	39,833	18,000	92,367	end of 15		
end of 16	75	1,689,332	0	187,298	0	37,523	0	1,914,153	0	0	35,640	41,107	18,000	94,747	end of 16		
			0		0		0		0	914,356	336,576	388,208	198,000	1,837,140			
Orange back	grounds ind	dicate hypothe	etical returns														
SIPS Retirement Planning System																PRIVACY POL	ICY TERMS OF U

Step 18: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

LIENT DASHBO	IARD STRU	JCTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS 1	OOLS				PREPARED BY: TIAL PLAN DATE: SED PLAN DATE:	
Structi	ured Ir	ncom	e Plar	nina													
idit Dynamie		100111	c i iui	innig													
فتنصفها لتنف																	
Scenario Nev	v Scenario (1)						~										
lanning	16 years ∨							1									
lorizon	io jeuro	401	1k (7)	ROTH	I IRA (7)	Savi	ngs (9)										
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	(3) (3)	Pension (3)	Yearly gift	Total Income	Year		
net return	59	6.00 %	IRA	4.00 %		1.00 %			1			<u></u>					
nitial amount		665,000		100,000		32,000		797,000	Subtotal	In O Franker	In Control	In O Franker	In O Franker				
bonus % w/bonus		0.00 %		0.00 %		0.00 % 32,000		797.000	of account incomes	Infl Factor 2.20 %	Infl Factor 3.20 %	Infl Factor 3.20 %	Infl Factor 0.00 %				
end of 1	60	704,900	0	104,000	0	32,320	0	841,220	0	175,000	0.20 0	0.20 10	0.000	175,000	end of 1		
end of 2	61	747,194	0	108,160	0	32,643	0	887,997	0	178,850	0	0	0	178,850	end of 2		
end of 3	62	792,025	0	112,486	0	32,970	0	937,481	0	182,785	0	0	0	182,785	end of 3		
end of 4	63	839,547	0	116,986	0	33,299	0	989,832	0	186,806	0	0	0	186,806	end of 4		
end of 5	64	889,920	0	121,665	0	33,632	0	1,045,217	0	190,916	0	0	0	190,916	end of 5		
end of 6 end of 7	65 66	943,315 999,914	0	126,532 131,593	0	33,969 34,308	0	1,103,815	0	0	26,010 26,842	30,000 30,960	18,000 18,000	74,010 75.802	end of 6 end of 7		
end of 8	67	1.059.908	0	136,857	0	34,508	0	1,105,815		0	20,042	30,960	18,000	75,602	end of 8		
end of 9	68	1,123,503	0	142.331	0	34,998	0	1,300,832	0	0	28,588	32,973	18,000	79,561	end of 9		
end of 10	69	1,190,913	0	148,024	0	35,348	0	1,374,285	0	0	29,503	34,028	18,000	81,531	end of 10		
end of 11	70	1,262,368	0	153,945	0	35,701	0	1,452,014	0	0	30,447	35,117	18,000	83,564	end of 11		
end of 12	71	1,338,110	0	160,103	0	36,058	0	1,534,271	0	0	31,421	36,241	18,000	85,662	end of 12		
end of 13	72	1,418,396	0	166,507	0	36,419	0	1,621,322	0	0	32,426	37,401	18,000	87,827	end of 13		
end of 14 end of 15	73 74	1,503,500	0	173,168 180,094	0	36,783	0	1,713,451 1,810,955	0	0	33,464 34,535	38,597	18,000	90,061	end of 14		
end of 15 end of 16	74	1,593,710	0	180,094	0	37,151 37,523	0	1,810,955	0	0	34,535	39,833 41,107	18,000	92,367 94,747	end of 15 end of 16		
end of 10	/5	1,009,002	0	107,290	0	07,020	0	1,214,100	0	914.356	336,576	388,208	198.000	1.837.140			
			*								0001010	000/1100		1,001,1110			

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.