# Income Adjustment Table on the Manage Income Page

09/17/2024 1:07 pm EDT

On the manage income page there is an income adjustment table. This table has the ability to edit the data that has been filtered in through the add income function. Below are the step-by-step guidelines for each of the buttons; Pick Years, Pick Year(s) to Remove, and Reset All Years.

## **Option A: Pick Years:**

Step 1: Add Adjustment Text Box: Type in the numeric number of the specific income. For withdraws the numeric number needs to start with the minus symbol and no commas can separate the numbers.

			YOUR CASE LIST	T SETTINGS HELP SIGN OUT
Manage Income Save Cancel				
Other income name	Travel			Income Adjustments
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment
First year income	(\$25,000)	Pick year(s)		
Inflation rate	5.0 %	Pick year(s) to remove	5 6	
Number of months of income in first year	12.0		8	
Income description		Reset all years	9 10 11	
Delay the income start until age Age to begin income	0 Client 1 age O Client 2 age		12	
Tax calculation option	Not Taxable ~		14 15	
			16 17	
			18 19 20	
			21	
			23 24	•
Orange backgrounds indicate hypothet	tical returns	Note that entered val	ues WILL roll down	to following years when blank
Retrament Punning System				PRIVACY POLICY TERMS OF USE

Step 2: Year: Click on the year text box within the income adjustment table of which years the new income/withdraw will be on.

			YOUR CASE LIST	SETTINGS HELP S	SIGN OUT
Manage Income					
Other income name	Travel		<b>+</b>	Income Adjustments	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment	*
First year income	(\$25,000)	Pick year(s)			
Inflation rate	5.0 %	Pick year(s) to remove	6		
Number of months of income in first year	12.0				
Income description		Reset all years			
Delay the income start until age Age to begin income	0 Client 1 age O Client 2 age		12 13		
Tax calculation option	Not Taxable ~		14 15 16		
			17 18		
			19 20		
			21 22 23		
			4 24		• •
Orange backgrounds indicate hypothet	ical returns	Note that entered	values WILL roll down	to following years when blank	
Retirement Planning System				PRIVACY POLICY TERMS	S OF USE

# Step 3: Pick Years: Click on the green Pick Years Button underneath the Add Adjustment text box.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Travel			Income Adjustments	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment	
First year income	(\$25,000)	Pick year(s)	✓ 3 ✓ 4		
Inflation rate	5.0 %	Pick year(s) to remove	<ul> <li>✓ 5</li> <li>✓ 6</li> </ul>		
Number of months of income in first year	12.0	Pick year(s) to territore	<ul> <li>✓</li> <li>✓</li> <li>7</li> <li>8</li> </ul>		
Income description		Reset all years	9		
Delay the income start until age Age to begin income	O Client 1 age O Client 2 age		11 12 13		
Tax calculation option	Not Taxable		<ul> <li>✓ 13</li> <li>✓ 14</li> <li>✓ 15</li> </ul>		
en an one en la sur dan			16		
			<ul> <li>✓ 18</li> <li>✓ 19</li> </ul>		
			20 21		
			22 23 24		*
			4		•
Orange backgrounds indicate hypothe	tical returns	Note that entered	alues WILL roll down 1	to following years when blank	k
SIPS Retirement Planning System				PRIVACY POLICY TERI	MS OF USE

Step 4: Add Adjustment Text Box: To stop the distribution type in the numeric number 0 into the text box.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income Save Cancel					
Other income name	Travel			Income Adjustments	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment	-
First year income	(\$25,000)	Pick year(s)		-15,000	
Inflation rate	5.0 %	Pick year(s) to remove	5	-15,000 -15,000	
Number of months of income in first year	12.0			-15,000	
Income description		Reset all years	10		
Delay the income start until age Age to begin income	0 Client 1 age O Client 2 age		12 13	-15,000 -15,000	
Tax calculation option	Not Taxable ~		14 15	-15,000	
			16 17 18	-15,000	
			19	-15,000	
			21		
			23 24		•
Orange backgrounds indicate hypothet	tical returns	Note that entered va	ues WILL roll down	to following years when blan	
Retirement Planning System				PRIVACY POLICY TER	MS OF USE

Step 5: Year: Click on the text box of which year the yearly distribution needs to stop by.

				YOUR	CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income							
Other income name	Travel			÷	1	Income Adjustments	
This is a Social Security income	0		ADD ADJUSTMENT	Ye	1	Income adjustment	*
First year income	(\$25,000)		Pick year(s)			-15,000 -15,000	
Inflation rate	5.0 %		Pick year(s) to remove			-15,000 -15,000	
Number of months of income in first year	12.0					-15,000	
Income description			Reset all years		0		
Delay the income start until age Age to begin income	O Client 1 age O Client 2 a	qe			2	-15,000	
Tax calculation option	Not Taxable ~				4	-15,000	
	NUTRADIE				6		
					8	-15,000 -15,000	
				2			
				2			
			1	• ?	4		+
Orange backgrounds indicate hypothe	tical returns		Note that entered value	s WILL n	oll down to	o following years when blan	k
SIPS Retirement Planning System						PRIVACY POLICY TER	MS OF USE

Step 6: Pick Years: Click on the green Pick Years Button underneath the Add Adjustment text box.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income Save Cancel					
Other income name	Travel	101 P 1020		Income Adjustments	
This is a Social Security income	Taulaa daa	0	Year 1 2	Income adjustment	•
First year income	(\$25,000) Pick year	(s)	3	-15,000 -15,000	
Inflation rate	5.0 % Pick year(s) to	remove	5	-15,000 -15,000 -15,000	
Number of months of income in first year	12.0	(		-15,000	
Income description	Reset all y	ears	10 11		
Delay the income start until age Age to begin income	0 Client 1 age Client 2 age	0	12 13	-15,000 -15,000	
Tax calculation option	Not Taxable 🗸	0	14 15 16	-15,000	
			17	-15,000	
		1	19 20	-15,000	
		0	21 22 23		
			23		• •
Orange backgrounds indicate hypothet	tical returns Note that	entered values	WILL roll down	to following years when bla	ink
Retrement Planning System				PRIVACY POLICY TE	RMS OF USE

# Step 7: Save: Click on the green Save button underneath the Manage Income subheading.

		YOUR CASE LIST SETTINGS HELP SIGN OUT
Manage Income		Income Adjustments
Otler income name	Travel	income Aujustmento
The is a Social Security income	0	ADD ADJUSTMENT Year Income adjustment
Fir t year income	(\$25,000)	Pick year(s) 3 -15.000 4 -15.000
Inf ation rate	5.0 %	S         -15,000           Pick year(s) to remove         6         -15,000
Number of months of income in first year	12.0	
Income description		Reset all years 10
Deay the income start until age Age to begin income	O Client 1 age O Client 2 age	12 -15,000 13 -15,000
		14 -15,000
Tax calculation option	Not Taxable V	15 16 17
		18 -15,000 19 -15,000
		20 0 21
		22 23
Orange backgrounds indicate hypothe	etical returns	Note that entered values WILL roll down to following years when blank
SIPS Retirement		PRIVACY POLICY TERMS OF USE

Step 8: Structured Income Planning Page: The new income should have a separate column in the structured income plan.

													1	YOUR	CASE LIST	SETTINGS   H	HELP SIGI	IN OUT
																PREPARED BY:		
CLIENT DASHBO		ICTUDED INCO				DV/COD	COET ALLOCA		WORTH L		EDODTE L	10010				ITIAL PLAN DATE:		
CLIENT DASHBO	JARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	ADVISOR /	ASSET ALLUCA	TION AND NET	WORTH   C	SRAPHS   H	EPORIS	TOOLS			REV	ISED PLAN DATE:		
Structu	ured Ir	ncom	e Plar	nnina														
	Cancel Add A				dd Target	Edit or Add So	enario Disr	alay Options										
							ينبينا البنيس											
Scenario New	v Scenario (1)						~											
Disastas		_				_		1										
Planning Horizon	20 years ∨	Savi	ngs (1)	Individua	al ROTH (1)	40	1K (1)											
		_						Accounts	Planned		_			Total		1		
Year		Account	Income	Account	Income	Account	Income	Total	Distribution	Wages (2)	SS (2)	Pension (2)	Travel	Income	Year			
net return	60	1.00 %		4.00 %		5.00 %	IRA				-							
initial amount bonus %		25,000 0.00 %		600,000 0.00 %		500,000		1,125,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor	Manage Infl Factor					
w/bonus		25,000	Manage	600,000	Manage	500,000	Manage	1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %					
end of 1	61	25,250	0	624,000	0	525,000	0	1,174,250	0	250,000	0	0	(25,000)	225,000	end of 1	1		
end of 2	62	25,502	0	648,960	0	551,250	0	1,225,712	0	255,500	0	0	(26,250)	229,250	end of 2			
end of 3 end of 4	63 64	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(15,000)	246,121	end of 3 end of 4			
end of 4 end of 5	65	26,015 26,275	0	701,915 729,992	0	607,753 638,141	0	1,335,683 1,394,408	0	266,866	49,543	42,000	(15,000) (15,000)	251,866 76,543	end of 4 end of 5			
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(15,000)	79,472	end of 6			
end of 7	67	26,803	0	789,559	0	703,550	0	1.519.912	0	0	52,764	44,731	(15,000)	82,495	end of 7			
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(15,750)	84,865	end of 8			
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(16,537)	87,298	end of 9			
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(17,364)	89,793	end of 10			
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(18,233)	92,354	end of 11			
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(15,000)	99,126	end of 12			
end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(15,000)	102,778	end of 13			
end of 14 end of 15	74 75	28,737 29.024	0	1,039,005	0	989,966 1.039,464	0	2,057,708 2,149,054	0	0	65,781 67,886	55,766 57,550	(15,000) (15,750)	106,546 109,686	end of 14 end of 15			
end of 15 end of 16	75	29,024	0	1,080,566	0		0	2,149,054	0	0	70.058	59,392	(16,750)	112,912	end of 15 end of 16			
end of 17	77	29,608	0	1,168,740	0	1,146,009	0	2,244,340	0	0	72,300	61,292	(17,364)	116,228	end of 17			
end of 18	78	29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(15,000)	122,867	end of 18			
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(15,000)	127,279	end of 19			
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	0	146,832	end of 20			
			0		0		0		0	1,033,487	1,014,538	860,073	(318,786)	2,589,312				

Option B: Pick Year(s) to Remove:

Step 9: Year: Click on the year text box within the income adjustment table of which years you would like to remove.

			YOUR CASE LIS	T SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Travel		+	Income Adjustments	
This is a Social Security income	0	ADD ADJUSTMENT	Year 1 2	Income adjustment	*
First year income	(\$25,000)	Pick year(s)	3 4	-5,000 -5,000	
Inflation rate	5.0 %	Pick year(s) to remove	5 6	-5,000 -10,000	
Number of months of income in first year	12.0	Pick year(s) to remove	7 8	-10,000 -10,000	
Income description		Reset all years	9 10	-10,000 -10,000	
Delay the income start until age Age to begin income	Client 1 age Client 2 age		11 12 13	-15,000 -15,000 -15,000	
Tax calculation option	Not Taxable		13	-15,000 -15,000 -5,000	
			16	-5,000	
			18	-5,000	
			20 21 22	0	
			23		-
_			<u> </u>		>
Orange backgrounds indicate hypothe	caireturns	Note that entered value	s WILL roll dowr	n to following years when blank PRIVACY POLICY TERM	

Step 10: Pick Years to Remove: Click on the green Pick Years to Remove underneath the Add Adjustment text box.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income Save Cancel					
Other income name	Travel		5	Income Adjustments	
This is a Social Security income		D ADJUSTMENT	Year 1 2	Income adjustment	*
First year income	(\$25,000)	Pick year(s)	3	-5,000 -5,000	
Inflation rate	5.0 %		✓ 5 ✓ 6 7	-5,000 -10,000 -10,000	
Number of months of income in first year	12.0		8	-10,000	
Income description Delay the income start until age			✓ 10 11	-10,000 -15,000	
Age to begin income	0 Client 1 age Client 2 age		12 13 14	-15,000 -15,000 -15,000	
Tax calculation option	Not Taxable ~		15 16	-5,000 -5,000	
			17 18 19	-5,000 -5,000 -5,000	
			20 21	0	
			22		
		l	4 24		Þ
Orange backgrounds indicate hypothet	ical returns	Note that entered values	WILL roll down t	to following years when blan	
Retirement Planning System				PRIVACY POLICY TEP	RMS OF USE

## Step 11: Save: Click on the green Save button underneath the Manage Income subheading.

				YOUR CASE LIS	T SETTINGS HELP	SIGN OUT
Manage Income						
1					Income Adjustments	
Ot er income name	Travel		ADD ADJUSTMENT	Year	Income eduction	
This is a Social Security income			ADD ADJOSTMENT		Income adjustment	Â
Fir t year income	(\$25,000)		Pick year(s)	3 4	-5,000 -5,000	
Infation rate	5.0 %		Pick year(s) to remove	5 6		
Number of months of income in first year	12.0		Fick year(s) to remove	7 8	-10,000 -10,000	
Income description			Reset all years	9		
Deay the income start until age				11	-15,000 -15,000	
Age to begin income	0 O Client 1 age O Client	2 age		13	-15,000	
Tax calculation option	Not Taxable	v		15	-5,000	
				17	-5,000	
				18	-5,000	
				20	0	
				22		
				< 24		+
Orange backgrounds indicate hypothe	tical returns		Note that entered valu	es WILL roll dowr	n to following years when bl	ank
SIPS Retirement Planning System					PRIVACY POLICY 1	ERMS OF USE

Step 12: Structured Income Planning Page: The new income should have a separate column in the structured income plan.

														YOUR	CASE LIST	SETTINGS	HELP S	IGN OU
															IN	PREPARED BY: ITIAL PLAN DATE:		
CLIENT DASHBOA	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH   C	RAPHS R	EPORTS	TOOLS				ISED PLAN DATE:		
Charleste	سمطاي																	
Structu																		
Edit Save Ca	ancel Add A	ccount Add	d Income A	dd Inc Tax 🛛 A	Add Target		enario Disp	lay Options										
Scenario New	Scenario (1)						$\sim$						- I -					
													- I -					
Planning 7																		
Horizon	20 years 🗸	Savi	ngs (1)	Individua	al ROTH (1)	40	1K (1)											
								Accounts	Planned	-		Γ 1		Total		1		
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Distribution	Wages (2)	SS (2)	Pension	Travel	Total Income	Year			
net return	60	1.00 %		4.00 %		5.00 %	IRA					(2)						
initial amount		25,000		600,000		500,000		1,125,000	Subtotal	Manage	Manage	Manage	Manage					
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor					
w/bonus		25,000	Manage	600,000	Manage	500,000	Manage	1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %					
end of 1 end of 2	61 62	25,250 25,502	0	624,000 648,960	0	525,000 551,250	0	1,174,250 1,225,712	0	250,000 255,500	0	0	(25,000) (26,250)	225,000 229,250	end of 1 end of 2			
end of 3	63	25,502	0	674,918	0	578,812	0	1,223,712		261,121	0	0	(5,000)	256,121	end of 3			
end of 4	64	26,015	0	701,915	0	607,753	0	1,335,683	0	266,866	0	0	(5,000)	261,866	end of 4			
end of 5	65	26,275	0	729,992	0	638,141	ő	1,394,408	o o	0	49,543	42,000	(5,250)	86,293	end of 5			
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(5,512)	88,960	end of 6			
end of 7	67	26,803	0	789,559	0	703,550	0	1,519,912	0	0	52,764	44,731	(10,000)	87,495	end of 7			
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(10,000)	90,615	end of 8			
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(10,500)	93,335	end of 9			
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(11,025)	96,133	end of 10			
end of 11 end of 12	71 72	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(15,000)	95,587 99,126	end of 11 end of 12			
end of 12 end of 13	72	28,171 28,452	0	960,619 999,044	0	897,928 942.824	0	1,886,718 1,970,320	0	0	61,765 63,741	52,361 54,036	(15,000) (15,000)	99,126	end of 12 end of 13			
end of 14	74	28,737	0	1,039,005	0	989,966	0	2.057.708	0	0	65,781	55,766	(15,750)	102,778	end of 14			
end of 15	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054	0	0	67,886	57,550	(5,000)	120,436	end of 15			
end of 16	76	29,314	0	1,123,788	0	1,091,437	0	2,244,540	0	0	70,058	59,392	(5,250)	124,200	end of 16			
end of 17	77	29,608	0	1,168,740	0	1,146,009	0	2,344,356	0	0	72,300	61,292	(5,000)	128,592	end of 17			
end of 18	78	29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(5,000)	132,867	end of 18			
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(5,250)	137,029	end of 19			
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	1.033.487	79,465	67,367 860.073	(199,788)	146,832 2.708.310	end of 20	I		
			0		0		0		0	1,033,487	1,014,538	860,073	(199,/88)	2,708,310				

# Option C: Reset All Years

Step 13: Reset All Years: Click on the green reset all years button underneath the add adjustment text box.

		YOU	JR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income					
Other income name	Travel			Income Adjustments	
This is a Social Security income	ADD ADJUSTMENT		Year 1 2	Income adjustment -5,000 -5,000	*
First year income	(\$25,000) Pick year(s)		3	-5,000	
Inflation rate	5.0 % Pick year(a) to remove		5 6		
Number of months of income in first year	12.0		7 8	-10,000 -10,000	
Income description	Reset all years		9 10	10,000	
Delay the income start until age			11 12	-15,000 -15,000	
Age to begin income	0 O Client 1 age O Client 2 age		13 14	-15,000	
Tax calculation option	Not Taxable ~	0	15	-5,000	
			17	-5,000	
			18 19	-5,000	
			20 21	0	
			22 23 24		-
		4			•
Orange backgrounds indicate hypothe	tical returns Note that entered val	ues WIL	.L roll down t	to following years when blan	k
SIPS Reterement				PRIVACY POLICY TER	MS OF USE

Step 14: Save: Click the green save button underneath the Manage Income Subheading.

			VOUD CASE LIST	SETTINGS HELP	SIGN OUT
Manage Income			YOUR CASE LIST	SETTINGS   HELP	SIGN OUT
				Income Adjustments	
Ot er income name	Travel	ADD ADJUSTMENT	Year	Income adjustment	*
This is a Social Security income	0			income aujustment	<b>^</b>
Fir t year income	(\$25,000)	Pick year(s)	3 4		
Inf ation rate	5.0 %	Pick year(s) to remove	5 6		
Number of months of income in first year	12.0				
Income description		Reset all years	10		
De ay the income start until age			12		
Age to begin income	0 Olient 1 age O Client 2 age		13		
Tax calculation option	Not Taxable ~		15 16		
			17		
			18		
			20		
			21		
			22		
			23		-
			4		- F
Orange backgrounds indicate hypothe	tical returns	Note that entered value	s WILL roll down t	o following years when blank	¢
SIPS Retirement Planning System				PRIVACY POLICY TERI	MS OF USE

Step 15: Structured Income Planning Page: The new income should have a separate column in the structured income plan.

														YOUR	CASE LIST	SETTINGS	HELP S	IGN OUT
																PREPARED BY:		
															INI	TIAL PLAN DATE:		
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	SSET ALLOCA	TION AND NET	WORTH 0	GRAPHS F	EPORTS 1	OOLS			REV	ISED PLAN DATE:		
Ctructu	urad lu	2000		nina														
Structu																		
Edit Save C	ancel Add /	Account Add	d Income A	dd Inc Tax 🖌	Add Target	Edit or Add So	enario Disp	lay Options										
Scenario New	Scenario (1)						~											
Planning	00.000000.000												1					
Horizon	20 years V	Savi	ngs (1)	Individua	al ROTH (1)	40	1K (1)											
								Accounts	Planned				***********	Total				
Year		Account	Income	Account	Income	Account	Income	Total	Distribution	Wages (2)	SS (2)	Pension (2)	Travel	Income	Year			
net return	60	1.00 %		4.00 %		5.00 %	IRA					(2)						
initial amount		25,000		600,000		500,000		1,125,000	Subtotal	Manage	Manage	Manage	Manage					
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor					
w/bonus end of 1	61	25,000	Manage 0	600,000 624,000	Manage 0	500,000 525,000	Manage	1,125,000	incomes 0	2.20 %	3.20 %	3.20 %	5.00 %	225,000	end of 1			
end of 2	62	25,250	0	648,960	0	525,000		1,174,230		255,500	0	0	(26,250)	229,250	end of 2			
end of 3	63	25,758	0	674,918	0	578,812	ő	1.279.488	o o	261,121	ő	Ő	(27,562)	233,558	end of 3			
end of 4	64	26.015	0	701,915	ō	607,753	0	1,335,683	0	266,866	0	0	(28,941)	237,925	end of 4			
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	0	49,543	42,000	(30,388)	61,155	end of 5			
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(31,907)	62,565	end of 6			
end of 7	67	26,803	0	789,559	0	703,550	0	1,519,912	0	0	52,764	44,731	(33,502)	63,993	end of 7			
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(35,177)	65,438	end of 8			
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9			
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10			
end of 11 end of 12	71 72	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11			
end of 12 end of 13	72	28,171 28,452	0	960,619 999,044	0	897,928 942,824		1,886,718 1,970,320	0	0	61,765 63,741	52,361 54,036	(42,758) (44,896)	71,367 72,881	end of 12 end of 13			
end of 13 end of 14	73	28,452	0	1,039,005	0	942,824	0	2,057,708	0	0	65,781	55,766	(44,896)	74,405	end of 13 end of 14			
end of 14 end of 15	74	29,024	0	1,039,005	0	1,039,464	0	2,057,708	0	0	67,886	55,766	(49,498)	74,405	end of 14 end of 15			
end of 16	76	29,024	0	1,123,788	0	1,039,404	0	2,149,034	0	0	70.058	59,392	(51,973)	75,938	end of 16			
end of 17	77	29,608	0	1,168,740	0	1,146,009	ő	2.344.356	0	0	72,300	61,292	(54,572)	79,020	end of 17			
end of 18	78	29,904	0	1,215,489	0	1,203,309	ŏ	2,448,702	o o	0	74,614	63,254	(57,300)	80,567	end of 18			
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19			
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20			
a second of the of	u 1631		0		0		0		0	1,033,487	1,014,538	860,073	(826,648)	2,081,449	La carcate de Part			

Step 16: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

															YOUR	R CASE LIST	SETTINGS H	IELP SIGN O
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					1											INI	TIAL PLAN DATE:	
CLIENT DA	SHBOA	RD STRU	CTURED INCOM	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH   0	BRAPHS R	EPORTS	TOOLS			REV	ISED PLAN DATE:	
Strug	otu	rod Ir	noom	e Plar	nina													
Juu	_																	
dit Sav	e Ca	ncel Add A	ccount Add	d Income A	dd Inc Tax 🖌	Add Target	Edit or Add Sc	enario Disp	lay Options									
cenario	New	Scenario (1)						~										
- 1																		
- 1																		
		_																
anning	2	:0 years ∨	Savir	ngs (1)	Individua	al ROTH (1)	40	1K (1)										
								- 10 C									í.	
Year			Account	Income	Account	Income	Account	Income	Accounts Total	Planned	11/2 2 2 2 (0)	SS (2)	Pension	Travel	Total Income	Year		
_									TOLAI	Distribution	Wages (2)	50404	(2)		Income			
net re u nitial ar ne		60	1.00 %		4.00 % 600,000		5.00 % 500,000	IRA	1.125.000	Subtotal	Manage	Manage	Manage	Manage				
bonu	%		0.00 %		0.00 %		0.00 %		1,120,000	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor				
w/bo u	IS		25,000	Manage	600,000	Manage	500,000	Manage	1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %				
end of	1	61	25,250	0	624,000	0	525,000	0	1,174,250	0	250,000	0	0	(25,000)	225,000	end of 1		
end of		62	25,502	0	648,960	0	551,250	0	1,225,712	0	255,500	0	0	(26,250)	229,250	end of 2		
	3	63	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(27,562)	233,558	end of 3		
end of	5	64 65	26,015	0	701,915	0	607,753	0	1,335,683	0	266,866	0	0	(28,941)	237,925	end of 4		
	-	66	26,275 26,538	0	729,992 759,191	0	638,141 670,048	0	1,394,408	0	0	49,543 51,128	42,000 43,344	(30,388) (31,907)	61,155 62,565	end of 5 end of 6		
end of		67	26,538	0	789,559	0	703.550	0	1,455,777		0	51,128	43,344 44,731	(31,907) (33,502)	63,993	end of 6 end of 7		
end of		68	27,071	0	821,141	0	738,728	0	1,586,940	o o	0	54,453	46,162	(35,177)	65,438	end of 8		
end of		69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9		
end o	10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10		
end of 1		71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11		
end of		72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12		
end of		73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13		
end of '		74 75	28,737 29,024	0	1,039,005 1,080,566	0	989,966 1,039,464	0	2,057,708 2,149,054	0	0	65,781 67,886	55,766 57,550	(47,141) (49,498)	74,405 75,938	end of 14 end of 15		
end of		76	29,024	0	1,123,788	0	1,039,464	0	2,149,054	0	0	70.058	59,392	(51,973)	75,938	end of 15 end of 16		
end of		77	29,608	0	1,168,740	0	1,146,009	0	2,244,340	0	0	72,300	61,292	(54,572)	79,020	end of 17		
end of		78	29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(57,300)	80,567	end of 18		
end of	19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19		
end of 2	20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20		
				0		0		0		0	1,033,487	1,014,538	860,073	(826,648)	2,081,449			

Step 17: 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.

														YOUR	CASE LIST	SETTINGS	HELP SI
																PREPARED BY:	
															INI	ITIAL PLAN DATE:	
CLIENT DASHBO	ARD STR	UCTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	REPORTS	TOOLS			REV	ISED PLAN DATE:	
Arusti	urad la	00000		nina													
Structu	urea n	ncom	e Plai	ining													
Edit Dynamic	Mode																
enario New	Scenario (1)						~										
	20 years v	Onuin	ngs (1)	المتعاقد بتعاديد	al ROTH (1)	40	1K (1)										
lorizon		Savi	iigs (1)	mumuua	IROTH(I)	40	IK (I)										
Year	1000	Account	Income	Account	Income	Account	Income	Accounts	Planned		SS (2)	Pension	Travel	Total	Year	1	
real		Account	income	Account	income	Account	income	Total	Distribution	Wages (2)	33 (2)	(2)	Haver	Income	fedi	1	
net return	60	1.00 %		4.00 %		5.00 %	IRA		12							1	
ir tial amount		25,000		600,000		500,000		1,125,000	Subtotal							1	
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor			1	
w/bonus end of 1	61	25,000 25,250	0	600,000 624.000	0	500,000 525.000	0	1,125,000	incomes 0	2.20 %	3.20 %	3.20 %	5.00 %	225.000	end of 1	1	
end of 1 end of 2	62	25,250	0	648,960	0	525,000	0	1,174,250	0	255,500	0	0	(25,000) (26,250)	229,250	end of 1 end of 2	1	
end of 3	63	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(27,562)	233,558	end of 3	1	
end of 4	64	26,015	0	701,915	0	607,753	0	1,335,683	0	266,866	0	ő	(28,941)	237,925	end of 4	1	
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	0	49,543	42,000	(30,388)	61,155	end of 5	1	
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(31,907)	62,565	end of 6	1	
end of 7	67	26,803	0	789,559	0	703,550	0	1,519,912	0	0	52,764	44,731	(33,502)	63,993	end of 7	1	
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(35,177)	65,438	end of 8	1	
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9	1	
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10	1	
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11	1	
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12	1	
end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13	1	
end of 14	74	28,737	0	1,039,005	0	989,966	0	2,057,708	0	0	65,781	55,766	(47,141)	74,405	end of 14	1	
end of 15	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054	0	0	67,886	57,550	(49,498)	75,938	end of 15	1	
	76	29,314	0	1,123,788	0	1,091,437	0	2,244,540	0	0	70,058	59,392	(51,973)	77,477	end of 16	1	
end of 16							0	2,344,356	0	0	72,300	61,292	(54,572)	79,020	end of 17	(	
end of 16 end of 17	77	29,608	0	1,168,740	0	1,146,009	~						(== 0.0 )	00.5-5		1	
end of 16 end of 17 end of 18	77 78	29,904	0	1,215,489	0	1,203,309	Ő	2,448,702	0	0	74,614	63,254	(57,300)	80,567	end of 18		
end of 16 end of 17	77		0 0				~						(57,300) (60,165) (63,174)	80,567 82,114 83,658	end of 18 end of 19 end of 20		

Step 18: 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 HI	ELP SIGN OU
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CLIENT DASHBOAR	RD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH   0	GRAPHS F	EPORTS	TOOLS			REV	ISED PLAN DATE:	
Structu	rod Ir	noom	o Dlar	nina													
				<u> </u>													
idit Save Car	ncel Add A	account Add	d Income A	dd Inc Tax 🖌	Add Target	Edit or Add Sc	enario Disp	lay Options									
Scenario New	cenario (1)						~										
Planning 2		-															
Planning 2 Horizon	years ∽	Savi	ngs (1)	Individua	al ROTH (1)	40	1K (1)										
								· · · · · · · · ·	Discost					Tread			
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension	Travel	Total Income	Year		
net return	60	1.00 %		4.00 %		5.00 %	IRA				1	(2)					
initial amount		25,000		600,000		500,000	nov	1,125,000	Subtotal	Manage	Manage	Manage	Manage				
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor				
w/bonus		25,000	Manage	600,000	Manage	500,000	Manage	1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %				
end of 1	61	25,250	0	624,000	0	525,000	0	1,174,250 1,225,712	0	250,000	0	0	(25,000)	225,000	end of 1		
end of 2 end of 3	62 63	25,502 25,758	0	648,960 674,918	0	551,250 578,812	0	1,225,712	0	255,500 261,121	0		(26,250) (27,562)	229,250 233,558	end of 2 end of 3		
end of 4	64	26,015	0	701,915	0	607,753	0	1,279,466	0	266,866	0		(27,562) (28,941)	233,556	end of 3 end of 4		
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	200,000	49,543	42,000	(30,388)	61,155	end of 5		
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(31,907)	62,565	end of 6		
end of 7	67	26,803	0	789,559	ő	703,550	0	1,519,912	o o	0	52,764	44,731	(33,502)	63,993	end of 7		
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(35,177)	65,438	end of 8		
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9		
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10		
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11		
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12		
end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13		
end of 14 end of 15	74 75	28,737	0	1,039,005	0	989,966	0	2,057,708	0	0	65,781	55,766	(47,141)	74,405	end of 14		
end of 15 end of 16	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054 2.244,540	0	0	67,886 70.058	57,550 59,392	(49,498) (51,973)	75,938	end of 15 end of 16		
end of 16 end of 17	76	29,314 29,608	0	1,123,788	0	1,091,437	0	2,244,540 2,344,356	0	0	70,058	61,292	(51,973) (54,572)	79,020	end of 16 end of 17		
end of 18	78	29,008	0	1,215,489	0	1,203,309	0	2,344,350	0	0	74,614	63,254	(57,300)	80,567	end of 18		
end of 19	79	30,203	o	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19		
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20		
	<b>-</b>		0		0		0		0	1.033.487	1.014.538	860.073	(826.648)	2.081.449	1101010-0010-0010-0		

Step 19: 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 H	ELP SIGN
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															IN	ITIAL PLAN DATE:	-
CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCA	TION AND NET	WORTH   C	RAPHS R	EPORTS	TOOLS			REV	ISED PLAN DATE:	
Structu	urod b	200m		nina													
		ICOIII	erial	mmy													
Edit Dynamic	c Mode																
Scenario New	v Scenario (1)						~										
		_															
Planning Horizon	20 years ∨	Savi	ngs (1)	Individua	al ROTH (1)	40	1K (1)										
		<b>_</b>						100 million - 30mil	220-02-04			- 7		1000		1	
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension	Travel	Total Income	Year		
net return	60	1.00 %		4.00 %	-	5.00 %	IRA	Total	Distribution	mugeo (2)		(2)		moonie			
initial amount	00	25,000		600,000		500,000	INA	1,125,000	Subtotal								
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor				
w/bonus		25,000		600,000		500,000		1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %				
end of 1	61	25,250	0	624,000	0	525,000	0	1,174,250	0	250,000	0	0	(25,000)	225,000	end of 1		
end of 2 end of 3	62 63	25,502	0	648,960 674,918	0	551,250	0	1,225,712	0	255,500 261,121	0	0	(26,250) (27,562)	229,250 233,558	end of 2 end of 3		
end of 3 end of 4	64	25,758 26,015	0	701,915	0	578,812 607,753	0	1,279,488 1,335,683		266,866	0	0	(27,562) (28,941)	233,558	end of 3 end of 4		
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	200,000	49,543	42,000	(30,388)	61,155	end of 5		
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(31,907)	62,565	end of 6		
end of 7	67	26,803	0	789,559	0	703,550	0	1,519,912	0	Ő	52,764	44,731	(33,502)	63,993	end of 7		
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(35,177)	65,438	end of 8		
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9		
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10		
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11		
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12		
end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13		
end of 14	74	28,737	0	1,039,005	0	989,966	0	2,057,708	0	0	65,781	55,766	(47,141)	74,405	end of 14		
end of 15	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054	0	0	67,886	57,550	(49,498)	75,938	end of 15		
end of 16	76	29,314	0	1,123,788	0	1,091,437	0	2,244,540	0	0	70,058	59,392	(51,973)	77,477	end of 16		
end of 17	77 78	29,608	0	1,168,740	0	1,146,009	0	2,344,356	0	0	72,300	61,292	(54,572)	79,020	end of 17		
		29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(57,300)	80,567	end of 18		
end of 18		20,202	0	1064100	0	1060 474	0										
end of 18 end of 19 end of 20	79 80	30,203 30,505	0	1,264,109 1,314,673	0	1,263,474 1,326,648	0	2,557,786 2.671.826	0	0	77,001 79,465	65,278 67,367	(60,165) (63,174)	82,114 83.658	end of 19 end of 20		

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.