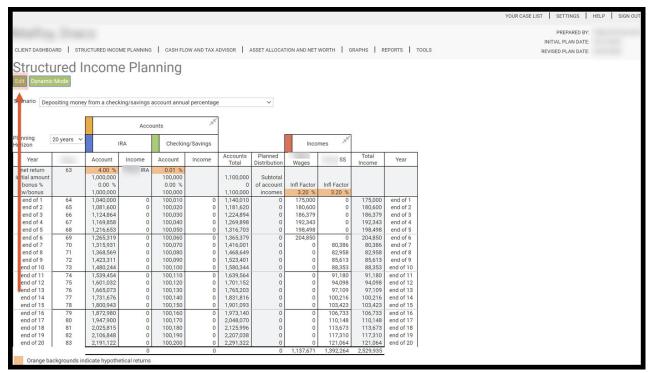
Depositing into a Checking/Savings Account Using the Annual Percentage Withdrawal Function

11/08/2024 1:13 pm EST

There are different ways to show deposits into a checking/savings account. Below is the step-by-step guideline for adding a deposit into a checking/savings account using the annual fixed withdrawal function.

Step 1: Edit: Click on the green edit button underneath the Structured Income Planning subheading.



Step 2: Manage: Click on the green manage button within the column for the checking/savings account.

												YOUR CASE LIST SETTINGS	HELP
												PREPARED BY	
												INITIAL PLAN DATE	
CLIENT DASHBO	ARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS T	00LS REVISED PLAN DATE	
Struct	ured I	ncom	e Plar	nina									
				dd Inc Tax A	-	Edit or Add Se	ning and a start	la Ontina					
Edit Save C	ancel Add a	ACCOUNT	a income A	dd inc Tax	Add Ta get	Edit of Add Si	cenario Disp	olay Options					
Scenario Den	oniting mone	from a chaol	king (paulaga	account annu	al norrepotage		~						
Deh	iostany mone	y nonn a checi	king/savings	account annu	ai percentage		*						
			Acco	ounts	7 ^K								
lanning	20 years 🗸		IRA	Checkin	ng/Savings			Inco	mes 📈				
Year		Account	Income	Account	Incime	Accounts	Planned	-	-	Total	Year		
NO. STORE	10				Incime	Total	Distribution	Wages	SS	Income	Year		
net return initial amount	63	4.00 %	IRA	0.01 %	1	1,100,000	Subtotal	Manage	Manage				
bonus %		0.00 %		0.00 %		1,100,000	of account	Infl Factor	Infl Factor				
w/bonus		1,000,000	Manage	100,000	Manage	1,100,000	incomes	3.20 %	3.20 %				
end of 1	64	1,040,000	0 O	100,010	0	1,140,010	0	175,000	0	175,000	end of 1		
end of 2	65	1,081,600	0	100,020	0	1,181,620	0	180,600	0	180,600	end of 2		
end of 3	66	1,124,864	0	100,030	0	1,224,894	0	186,379	0	186,379	end of 3		
end of 4	67	1,169,858	0	100,040	0	1,269,898	0	192,343	0	192,343	end of 4		
end of 5	68	1,216,653	0	100,050	0	1,316,703	0		0	198,498	end of 5		
end of 6	69	1,265,319	0	100,060	0	1,365,379	0	204,850	0	204,850	end of 6		
end of 7	70	1,315,931	0	100,070	0	1,416,001	0		80,386	80,386	end of 7		
end of 8 end of 9	71 72	1,368,569 1,423,311	0	100,080 100,090	0	1,468,649	0		82,958 85,613	82,958 85,613	end of 8 end of 9		
end of 9 end of 10	72	1,423,311	0	100,090	0	1,523,401	0		85,613	88,353	end of 9 end of 10		
end of 10	73	1,480,244	0	100,100	0	1,639,564	0		91,180	91,180	end of 10		
end of 12	75	1,601,032	0	100,110	0	1,701,152	0		94,098	94,098	end of 12		
end of 13	76	1,665,073	0	100,130	0	1,765,203	0		97,109	97,109	end of 13		
end of 14	77	1,731,676	0	100,140	0	1,831,816	0		100,216	100,216	end of 14		
end of 15	78	1,800,943	0	100,150	0	1,901,093	0	0	103,423	103,423	end of 15		
end of 16	79	1,872,980	0	100,160	0	1,973,140	0		106,733	106,733	end of 16		
end of 17	80	1,947,900	0	100,170	0	2,048,070	0		110,148	110,148	end of 17		
end of 18	81	2,025,815	0	100,180	0	2,125,996	0		113,673	113,673	end of 18		
end of 19	82	2,106,848	0	100,190	0	2,207,038	0		117,310	117,310	end of 19		
end of 20	83	2,191,122	0	100,200	0	2,291,322	0		121,064	121,064	end of 20		
			0		0		0	1,137,671	1,392,264	2,529,935			
Orange ba	ackgrounds in	dicate hypoth	etical returns	<u>.</u>									

Option A: Pick Years:

Step 3: Structured Income Type: Click on the radio button next to Annual Percentage Withdrawal.

					YOUR	CASE LIST SETTI	NGS HELP	SIGN OUT
Manage Accoun	t .							
	View / Edit Death Benefit View / Edit Actual Values							
Current Foundation								
Account name	Checking/Savings					Income Dat		
Initial account balance		Structured Income Type	ADD INCOME		Year	Income	a Variable	
Initial account balance	\$100,000	 Start payout from income rider 	100 Tel 100 Cont. 100 Cont.		1			
Hypothetical return	0.01 %		Pick year(s)		2			
Bonus	0.0 %		OR		4			
	0.0	Liquidate or annuitize			5			
Optional Account description		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR	Ö	6			
Optional account company		 Liquidate account (in so many years) 	U.I.		7			
Other			Start year for X years		8			
-		Mills Jacobs	0		10			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals O Annual fixed withdrawal		ŏ	11			
Add money later - deferred account			Pick year(s) to remove		12			
Years deferred	0	Annual percentage withdrawal 0.0 %			13 14			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15			
		 Beneficial IRA RMD (based on beneficiaries life) 			16			
Risk level	Fixed Interest				17			
Account owner	~		Reset all years		18 19			
Account type	NO Y	Calculated Plan Withdrawals Make-up total owners RMD from one account			20			
Add an income rider	NQ				21			
Based on 🔘 age 🔿 0	Client2 's age 🔘 Joint	 Make-up total benef RMD from one account 			22			
Select income rider	~	O Make-up income gap based on target income			23 24			-
Number of months of payout in first ye					/4			- F
Enter manual payout		Annual Savings						
		Annual Savings						
Request Additional Rider Remove In	come Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	alues WILI	L NOT roll down to fo	llowing years w	hen blank

Step 4: Annual Percentage Withdraw Text Box: Type in the monetary amount. The number will start with a negative symbol (-).

					YOUR	CASE LIST SETTIN	GS HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type				Income Data		
Initial account balance	\$100,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	0.01 %		Pick year(s)	Ö	2 3			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional Account description		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR		6			
Optional account company Other		 Liquidate account (in so many years) 	Start year for X years		8			1.1
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 11			
Add money later - deferred account Years deferred	0	Annual fixed withdrawal Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12			
Asset plan allocation	Fixed Interest Sel	Required minimum distribution (RMD)	Remove year to end of plan		14 15			
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 			16 17			
Account owner	~	Calculated Plan Withdrawals	Reset all years		18 19			
Account type Add an income rider	NQ ~	Make-up total owners RMD from one account			20 21			
the second se	Client2 's age 🔘 Joint	Make-up total benef RMD from one account Make-up income gap based on target income			22 23			
Select income rider Number of months of payout in first ye	ear 12.0	 Make-up income gap based on target income 			24			₩ }
Enter manual payout	ncome Rider	Annual Savings						2.0
Orange backgrounds indicate hy	pothetical returns		Note that enter	red va	lues WILL	NOT roll down to foll	owing years wh	ien blank

Step 5: Income Data: Within the Income data table click on the Year text box that you would like to select.

					YOU	IR CASE LIST	NGS HELP	SIGN
Manage Accour	1†							
	View / Edit Death Benefit View / Edit Actual Values			1				
Account name	Checking/Savings	Structured Income Type		*		Income Da	ta	
Initial account balance	\$100,000	Income Riders	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	0.01 %		Pick year(s)	0	2			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		6			
Account description Optional account company		O Liquidate account (in so many years)	OR	0	7 8			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified) \sim	Withdrawals	0		10 11			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	Ö	12			
Years deferred	0	Annual percentage withdrawal -1.5 %			13 14			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		14			
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 			16			
			Reset all years		17 18			
Account owner	~	Calculated Plan Withdrawals	ricoor an youro	0	19			
Account type	NQ ~	O Make-up total owners RMD from one account			20			
Add an income rider		 Make-up total benef RMD from one account 			21 22			
Based on 💿 age 🔿	Client2 's age O Joint				23			
Select income rider	~	 Make-up income gap based on target income 		0	24			-
Number of months of payout in first ye	ear 12.0							•
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	ncome Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red val	ues WI	LL NOT roll down to fo	llowing years v	vhen blank

Step 6: Pick Years: Click on the green button Pick Years.

					YOUR CASE L	IST SETTING	IS HELP	SIGN OUT
Manage Accour	1†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type				Income Data		
Initial account balance	\$100,000	Income Riders O Start payout from income rider	ADD INCOME		Year In 1	come	Variable	*
Hypothetical return	0.01 %		Pick year(s)		2			
Bonus	0.0 %	Liquidate or annuitize	OR	 Image: A start of the start of	4			
Optional Account description		Annuitize (for years certain) 1.0 % Liquidate account (in so many years)	Start year for rest of plan OR		5 6 7			
Optional account company Other			Start year for X years		8 9 10			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals O Annual fixed withdrawal			10			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal -1.5 %	Pick year(s) to remove		12 13 14			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15			
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 			16 17			
Account owner	~	Calculated Plan Withdrawals	Reset all years	Ö	18 19			
Account type	NQ	Make-up total owners RMD from one account		0	20			
Add an income rider		 Make-up total benef RMD from one account 			21			
Based on 💿 age 🔾	Client2 's age O Joint				22 23			
Select income rider	~	 Make-up income gap based on target income 			23			
Number of months of payout in first ye	ear 12.0							•
Enter manual payout		Annual Savings						
Request Additional Rider Remove In	ncome Rider	Annual fixed savings						
Orange backgrounds indicate hyp	pothetical returns		Note that enter	ed val	lues WILL NOT	roll down to follo	wing years wl	nen blank

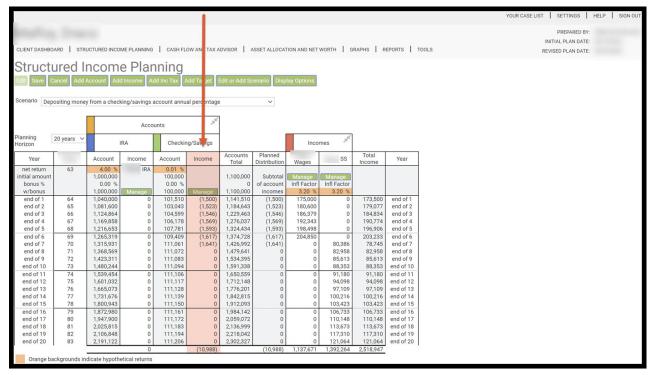
Step 7: Clicking: After clicking on the Pick Years green button, the term "percent" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

				YOU	R CASE LIST SE	TTINGS HELP	SIGN OUT
Manage Accour	1 [†]						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	Checking/Savings				Income	Data	
		Structured Income Type	ADD INCOME	Year	Income	Variable	
Initial account balance	\$100,000	Start payout from income rider	ADDINOONE	1	percent	-1.5	
Hypothetical return	0.01 %		Pick year(s)	2	percent	-1.5	
Bonus			OR	3	percent	-1.5	
bonus	0.0 %	Liquidate or annuitize		4	percent	-1.5 -1.5	
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan	6	percent	-1.5	
Account description		O Liquidate account (in so many years)	OR	7	percent	-1.5	
Optional account company Other			Start year for X years	8			
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals		10			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	12			
Years deferred	0	O Annual percentage withdrawal 0.0 %		13			
		 Required minimum distribution (RMD) 		14			
Asset plan allocation	Fixed Interest Sel		Remove year to end of plan	15			
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 		16			
			Reset all years	18			
Account owner	~	Calculated Plan Withdrawals	Reset un yeurs	19			
Account type	NQ ~	Make-up total owners RMD from one account		20			
Add an income rider		Make-up total benef RMD from one account		21			
Based on 💿 age 🔿	Client2 's age 🔿 Joint			22			
Select income rider	~	 Make-up income gap based on target income 		23			-
Number of months of payout in first ye	ear 12.0			.€			· •
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove In	ncome Rider						
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red values WII	LL NOT roll down to	o following years w	hen blank

Step 8: Save: Click on the green button Save underneath the Manage Account subheading.

				YC	UUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Accour	ht						
	View / Edit Death Benefit View / Edit Actual Values						
Ac count name	Checking/Savings	Structured Income Type			Incom	e Data	
Initial account balance	\$100,000	Income Riders O Start payout from income rider	ADD INCOME	Year	Income	Variable -1.5	*
Hypothetical return	0.01 %	Start payout norm income rider	Pick year(s)	2	percent	-1.5	
Bonus	0.0 %		OR	3 4	percent	-1.5	
Octional	0.0	Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	5	percent	-1.5	
Account description		Liquidate account (in so many years)	OR	6	percent	-1.5 -1.5	
Optional account company		C Liquidate account (in so many years)		8	percent	-1.5	
Dther			Start year for X years	9			
Ta calculation option	Tax Income Distributions (Qualified) \sim	Withdrawals O Annual fixed withdrawal		10			
Ac i money later - deferred account	0		Pick year(s) to remove	12			
Years deferred	0	Annual percentage withdrawal 0.0 %		13			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	15			
Ri: k level	Fixed Interest	Beneficial IRA RMD (based on beneficiaries life)		16 17			
Account owner	~		Reset all years	18			
		Calculated Plan Withdrawals		19 20			
Account type Add an income rider	NQ ~	Make-up total owners RMD from one account		20			
to be used to see a second	Client2 's age O Joint	 Make-up total benef RMD from one account 		22			
Select income rider	~	O Make-up income gap based on target income		23			-
Number of months of payout in first ye	ear 12.0			4			•
Enter manual payout		Annual Savings					
Request Additional Rider Remove In	ncome Rider	Annual fixed savings					
Orange backgrounds indicate hy			Note that enter	ed values V	VILL NOT roll down	to following years wh	en blank

Step 9: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.



Option B: Start Years for Rest of Plan:

Step 10: Structured Income Type: Click on the radio button next to Annual Percentage Withdrawal.

					YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour	n†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type			Inc	ome Data		
Initial account balance	\$100,000	Income Riders	ADD INCOME	Ye		Var	iable	*
Hypothetical return	0.01 %	 Start payout from income rider 	Pick year(s)		2			
			OR	0 3	3			
Bonus	0.0 %	Liquidate or annuitize			5			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR	6	5			
Account description Optional account company		 Liquidate account (in so many years) 	ÖK	0 7	7			
Other			Start year for X years)			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	1				
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove					
Years deferred		Annual percentage withdrawal 0.0 %		1	3			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan					
The set of		O Beneficial IRA RMD (based on beneficiaries life)	nemere year to end or plan					
Risk level	Fixed Interest							
Account owner	~	Calculated Plan Withdrawals	Reset all years					
Account type	NQ ~	Make-up total owners RMD from one account		2				
Add an income rider		Make-up total benef RMD from one account		2	2			
	Client2 's age O Joint	O Make-up income gap based on target income		2				
Select income rider Number of months of payout in first ye				.</td <td>4</td> <td></td> <td>)</td> <td>•</td>	4)	•
Enter manual payout	12.0							
		Annual Savings						
Request Additional Rider Remove Ir	ncome Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that enter	ed value	s WILL NOT roll do	wn to following	years whe	an blank

Step 11: Annual Percentage Withdraw Text Box: Type in the monetary amount. The number will start with a negative symbol (-).

					YOUR	CASE LIST SETTIN	GS HELP	SIGN OUT
Manage Accoun	t							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type				Income Data		
Initial account balance	\$100,000	Income Riders	ADD INCOME		Year	Income	Variable	*
		 Start payout from income rider 			1			
Hypothetical return	0.01 %		Pick year(s)		3			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Account description		Liquidate account (in so many years)	OR		7			
Optional account company		C Equidate decount (in so many years)		ŏ	8			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 11			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12			
Years deferred	0	Annual percentage withdrawal 0.0 %	<					
Asset plan allocation	Fixed Interest Sel	Required minimum distribution (RMD)	Remove year to end of plan		14 15			
Asset plan allocation	Fixed interest	 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end of plan		16			
Risk level	Fixed Interest		2		17			
Account owner	~		Reset all years		18			
Account type	NO	Calculated Plan Withdrawals			19 20			
Add an income rider	NQ ~	Make-up total owners RMD from one account			21			
The second se	Client2 's age 🔘 Joint	 Make-up total benef RMD from one account 			22			
Select income rider	~	O Make-up income gap based on target income			23 24			-
Number of months of payout in first ye	ar 12.0							- F
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	come Rider							
Orange backgrounds indicate hyp	othetical returns		Note that ente	red va	lues WILI	NOT roll down to fol	owing years w	hen blank

Step 12: Income Data: Within the Income data table click on the Year text box that you would like to start the year for the rest of the plan.

					YOUR	R CASE LIST SETTI	IGS HELP	SIGN OUT
Manage Accour	nt.							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type Income Riders	ADD INCOME	ļ	Year	Income Dat	a Variable	4
22 1221 40 br		 Start payout from income rider 			1 2			
Hypothetical return	0.01 %		Pick year(s) OR		3			
Bonus	0.0 %	Liquidate or annuitize			4 5			
Optional Account description Optional account company Other		 Annuitize (for years certain) 1.0 % Liquidate account (in so many years) 	Start year for rest of plan OR Start year for X years		6 7 8 9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals O Annual fixed withdrawal	0		10 11			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal 3 %	Pick year(s) to remove		12 13 14			
Asset plan allocation	Fixed Interest Sel	Required minimum distribution (RMD)	Remove year to end of plan		15			
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 			16 17			
Account owner	~	Calculated Plan Withdrawals	Reset all years		18 19			
Account type	NQ ~	O Make-up total owners RMD from one account			20 21			
Add an income rider Based on age	Client2 's age 🔘 Joint	Make-up total benef RMD from one account			22			
Select income rider	×	O Make-up income gap based on target income			23 24			-
Number of months of payout in first ye	ear 12.0			4) ·
Enter manual payout	icome Rider	Annual Savings Annual fixed savings						
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red val	lues WIL	L NOT roll down to fo	lowing years w	hen blank

Step 13: Start Years for Rest of Plan: Click on the green button Start Years for Rest of Plan.

				Y	OUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Accour	1 [†]						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	Checking/Savings	Structured Income Type			Incom	ne Data	
Initial account balance	\$100,000	Income Riders	ADD INCOME	Year	Income	Variable	
()		 Start payout from income rider 					
Hypothetical return	0.01 %		Pick year(s) OR	3			
Bonus	0.0 %	Liquidate or annuitize	UK .	4			
Optional			Start year for rest of plan	5			
Account description		 Liquidate account (in so many years) 	OR	7			
Optional account company				8			
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified) \sim	Withdrawals		10			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	12			
Years deferred	0	Annual percentage withdrawal -3 %		13			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	14			
		 Beneficial IRA RMD (based on beneficiaries life) 		16			
Risk level	Fixed Interest			17			
Account owner	~		Reset all years	18			
Account type	NQ	Calculated Plan Withdrawals Make-up total owners RMD from one account		20			
Add an income rider				21			
Based on 🔘 age 🔾	Client2 's age 🔘 Joint	Make-up total benef RMD from one account		22			
Select income rider	~	 Make-up income gap based on target income 		23			-
Number of months of payout in first ye	12.0						- F
Enter manual payout		Annual Savings					
		Annual fixed savings					
	come Rider						
Orange backgrounds indicate hyp	oothetical returns		Note that ente	red values V	VILL NOT roll down	to following years w	vhen blank

Step 14: Clicking: After clicking on the Start Years for Rest of Plan button, the term "percent" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

					YOUR CA	ASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour)†								
	View / Edit Death Benefit View / Edit Actual Values						I 1		
Account name	Checking/Savings	Structured Income Type				Incom	e vata		
Initial account balance	\$100,000	Income Riders	ADD INCOME		Year 1	Income	Var	able	A
Hypothetical return	0.01 %	 Start payout from income rider 	Pick year(s)		2				
Bonus	0.0 %		OR		3				
ning et al. St	0.0 ~	Liquidate or annuitize		ö	5		•		
Optional Account description		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR		6		· ·		
Optional account company		O Liquidate account (in so many years)	0.525		7	percent		1.0 1.0	
Other			Start year for X years	ŏ	9	percent	-3	0.0	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 11	percent percent		1.0 1.0	
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12	percent		.0	
Years deferred	0	Annual percentage withdrawal 0.0 %			13	percent		.0	
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		14 15	percent		1.0 1.0	
Risk level		O Beneficial IRA RMD (based on beneficiaries life)			16	percent		.0	
RISK level	Fixed Interest				17 18	percent		1.0 1.0	
Account owner	~	Calculated Plan Withdrawals	Reset all years		19	percent percent		.0	
Account type	NQ ~	O Make-up total owners RMD from one account			20	percent		.0	
Add an income rider		 Make-up total benef RMD from one account 			21 22	percent		1.0 1.0	
Based on age age Select income rider	Client2 's age O Joint	O Make-up income gap based on target income			23	percent	-	.0	
Number of months of payout in first ye	ear 12.0			-	24	nercent	4	•	
Enter manual payout	12.0	Annual Caulage							
		Annual Savings Annual fixed savings							
Request Additional Rider Remove In	acome Rider								
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red val	lues WILL N	OT roll down	to following	years whe	n blank

Step 15: Save: Click on the green button Save underneath the Manage Account subheading.

					YOUR	CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accour	nt .							
	View / Edit Death Benefit View / Edit Actual Values							
Save Sancer Frenz Ear meone	View / Euro Actual Villes							
Ac ount name	Checking/Savings	Structured Income Type				Income D	Data	
Initial account balance	\$100,000	Income Riders Start payout from income rider	ADD INCOME		Year 1	Income	Variable	^
Hypothetical return	0.01 %		Pick year(s)		2			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Op <mark>ional</mark> Account description		O Annuitize (for years certain) 1.0 %	Start year for rest of plan OR		6			
Optional account company		 Liquidate account (in so many years) 	20100. 2		7 8	percent	-3.0 -3.0	
Other			Start year for X years		9	percent	-3.0	
Ta calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10	percent	-3.0	
Act money later - deferred account		Annual fixed withdrawal Annual percentage withdrawal	Pick year(s) to remove		11 12	percent	-3.0 -3.0	
Years deferred	0				13 14	percent	-3.0 -3.0	
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	ŏ	15	percent	-3.0	
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 			16 17	percent percent	-3.0 -3.0	
Account owner	~		Reset all years	Ö	18 19	percent	-3.0 -3.0	
Account type	NQ	Calculated Plan Withdrawals Make-up total owners RMD from one account			20	percent	-3.0	
Add an income rider	ing -				21	percent	-3.0	
Based on 💿 age 🔾	Client2 's age O Joint	 Make-up total benef RMD from one account 			22	percent	-3.0	
Select income rider	~	 Make-up income gap based on target income 			23	percent	-3.0	*
Number of months of payout in first ye					24	nercent	-3.0	•
Enter manual payout		Annual Savings						
	ncome Rider							
Orange backgrounds indicate hy	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to	following years whether the second seco	nen blank

Step 16: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

												YOUR CASE LIST SETTINGS
												PREPARED BY
												INITIAL PLAN DATE
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AN TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH C	RAPHS R	EPORTS T	00LS REVISED PLAN DATE
Charles and	une el lu				_							
Structu	urea II	ICOL	e Plar	ining								
Edit Save C	Cancel Add A	Account Add	d Income A	dd Inc Tax	Add Taiget I		cenario Disp	lay Options				
Scenario Dep	ositing money	from a check	king/savings	account annu	al percentage		~					
1.000												
			Acco	unts	7 ^K							
Janning			1000									
Planning Horizon	20 years ∨	1	RA	Checkir	ng/Sav			Inco	mes 🤿 🕅			
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
net return	63	4.00 %	IRA	0.01 %		rotai	Distribution	mages		moonie		
initial amount		1,000,000		100,000		1,100,000	Subtotal	Manage	Manage			
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor			
w/bonus end of 1	64	1,000,000	Manage 0	100,000	Manage 0	1,100,000	incomes 0	3.20 % 175.000	3.20 %	175.000	end of 1	
end of 1 end of 2	65	1,040,000	0	100,010	0	1,140,010	0	1/5,000	0	1/5,000	end of 1 end of 2	
end of 3	66	1,124,864	0	100,020	0	1,224,894	0	186,379	0	186,379	end of 3	
end of 4	67	1,169,858	0	100,040	0	1,269,898	0	192,343	0	192,343	end of 4	
end of 5	68	1,216,653	0	100,050	0	1,316,703	0	198,498	0	198,498	end of 5	
end of 6	69	1,265,319	0	100,060	0	1,365,379	0	204,850	0	204,850	end of 6	
end of 7	70	1,315,931	0	103,072	(3,002)	1,419,003	(3,002)	0	80,386	77,384	end of 7	
end of 8 end of 9	71 72	1,368,569 1,423,311	0	106,174 109,370	(3,092)	1,474,743	(3,092) (3,185)	0	82,958 85,613	79,866 82,428	end of 8 end of 9	
end of 9 end of 10	72	1,423,311	0	112,662	(3,185) (3,281)	1,532,682 1,592,906	(3,185) (3,281)	0	85,613	82,428	end of 9 end of 10	
end of 10	74	1,539,454	0	116,053	(3,380)	1,655,507	(3,380)	0	91,180	87,800	end of 11	
end of 12	75	1,601,032	0	119,547	(3,482)	1,720,578	(3,482)	0	94,098	90,616	end of 12	
end of 13	76	1,665,073	0	123,145	(3,586)	1,788,218	(3,586)	0	97,109	93,522	end of 13	
end of 14	77	1,731,676	0	126,852	(3,694)	1,858,527	(3,694)	0	100,216	96,522	end of 14	
end of 15	78	1,800,943	0	130,670	(3,806)	1,931,612	(3,806)	0	103,423	99,618	end of 15	
end of 16	79	1,872,980	0	134,603	(3,920)	2,007,583	(3,920)	0	106,733	102,813	end of 16	
end of 17 end of 18	80 81	1,947,900 2,025,815	0	138,654 142,828	(4,038) (4,160)	2,086,554 2,168,644	(4,038) (4,160)	0	110,148 113,673	106,110 109,513	end of 17 end of 18	
end of 18 end of 19	82	2,025,815	0	142,828	(4,160) (4,285)	2,168,644 2,253,975	(4,160) (4,285)	0	117,310	113,026	end of 18 end of 19	
end of 20	83	2,100,040	0	151,556	(4,203)	2,342,678	(4,203)	0	121,064	116,651	end of 20	
			0		(51,325)		(51,325)	1,137,671	1,392,264	2,478,610		

Option C: Start Year for X Years:

Step 17: Structured Income Type: Click on the radio button next to Annual Percentage Withdrawal.

					YOUR	CASE LIST SET	TINGS HEL	P SIGN OUT
Manage Accour	1t							
	View / Edit Death Benefit View / Edit Actual Values							
Save Cancer View / Eule moorne	VIEW/ Luit Dealth Denent VIEW/ Luit Actual Values							
Account name	Checking/Savings							
		Structured Income Type Income Riders	ADD INCOME	<u> </u>	Year	Income [Variable	
Initial account balance	\$100,000	Start payout from income rider	Abbiittoome		1	income	valiable	
Hypothetical return	0.01 %		Pick year(s)		2			
Bonus	0.0 %		OR		3			
bonds	0.0	Liquidate or annuitize			5			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		6			
Account description		 Liquidate account (in so many years) 	OR		7			
Optional account company Other			Start year for X years		8			
NE 19					9 10			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals			11			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12			
Years deferred	0	Annual percentage withdrawal 0.0 %			13			
Asset plan allocation		 Required minimum distribution (RMD) 	Doministry of the law		14			
Asset plan allocation	Fixed Interest Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15 16			
Risk level	Fixed Interest				17			
Account owner	~		Reset all years		18			
		Calculated Plan Withdrawals			19			
Account type	NQ ~	 Make-up total owners RMD from one account 			20 21			
Add an income rider		 Make-up total benef RMD from one account 			22			
	Client2 's age O Joint	O Make-up income gap based on target income			23			
Select income rider	~	0		-	24			
Number of months of payout in first ye	ear 12.0			_				
Enter manual payout		Annual Savings						
		Annual fixed savings						
	ncome Rider							
Orange backgrounds indicate hy	pothetical returns		Note that ente	red va	lues WILI	NOT roll down to	following years	when blank

Step 18: Annual Percentage Withdraw Text Box: Type in the monetary amount. The number will start with a negative symbol (-).

					YOUR	CASE LIST SETTI	NGS HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type				Income Dat	a	
Initial account balance	\$100,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	0.01 %	O start pajout non meone had	Pick year(s)		2			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional		Annuitize (for years certain)	Start year for rest of plan		5			
Account description		 Liquidate account (in so many years) 	OR		7			
Optional account company		0	2001	0	8			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 11			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12			
Years deferred	0	Annual percentage withdrawal 0.0 %	4		10			
		 Required minimum distribution (RMD) 			14			
Asset plan allocation	Fixed Interest Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15 16			
Risk level	Fixed Interest				17			
Account owner	~		Reset all years	ŏ.	18			
Account office		Calculated Plan Withdrawals			19			
Account type	NQ 🗸	 Make-up total owners RMD from one account 			20			
Add an income rider		Make-up total benef RMD from one account			21 22			
Based on 💿 age 🔘	Client2 's age O Joint	O Make-up income gap based on target income			23			
Select income rider	~	O Make up income gap based on target income		2	24			*
Number of months of payout in first y	12.0			4				•
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	ncome Rider							
Orange backgrounds indicate hy	pothetical returns		Note that ente	red val	lues WILL	NOT roll down to fo	llowing years wi	nen blank

Step 19: Income Data: Within the Income data table click on the Year text box that you would like to select.

				YOU	R CASE LIST	IGS HELP	SIGN OU
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values			1			
Account name	Checking/Savings	Structured Income Type		,	Income Dat	а	
Initial account balance	\$100,000	Income Riders Start payout from income rider	ADD INCOME	Year 1	Income	Variable	*
Hypothetical return	0.01 %		Pick year(s)	2			
Bonus	0.0 %	Liquidate or annuitize	OR	4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan				
Account description Optional account company		O Liquidate account (in so many years)	OR	7			
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified) \checkmark	Withdrawals		11			
Add money later - deferred account Years deferred	0	Annual fixed withdrawal Annual percentage withdrawal -2 %	Pick year(s) to remove	12			
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	14 15			
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 		16 17			
Account owner	~	Calculated Plan Withdrawals	Reset all years	18			
Account type	NQ ~	Make-up total owners RMD from one account		20			
Add an income rider Based on age	Client2 's age O Joint	O Make-up total benef RMD from one account		22			
Select income rider	v	O Make-up income gap based on target income		23			-
Number of months of payout in first ye				n 24			•
Enter manual payout		Annual Savings					
Request Additional Rider Remove In	ncome Rider						
Orange backgrounds indicate hy	pothetical returns		Note that entered	values WIL	L NOT roll down to fol	lowing years w	hen blank

Step 20: Start Year for X Years Text Box: Within the text box for Start Year fox X Years, type in the how many years you would like the monetary amount to be distributed.

					YOUR CASE LIST	SETTINGS HE	LP SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	Checking/Savings	Ohandara Ilanana Tara			Incor	ne Data	
Initial account balance	\$100,000	Structured Income Type Income Riders	ADD INCOME		ear Income 1	Variable	÷
Hypothetical return	0.01 %	 Start payout from income rider 	Pick year(s)		2		
Bonus	0.0 %	Liquidate or annuitize	OR		4		
Optional Account description Optional account company Other		Annuitize (for years certain) 1.0 % Liquidate account (in so many years)	Start year for rest of plan OR Start year for X years		6 7 8 9		
Tax calculation option Add money later - deferred account Years deferred Asset plan allocation Risk level	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal	Pick year(s) to remove		2 3 4 5 6		ł
Account owner Account type Add an income rider Based on age Select income rider	Client2 's age O Joint	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account Make-up income gap based on target income	Reset all years		22		•
Number of months of payout in first ye Enter manual payout Request Additional Rider Crange backgrounds indicate hy	ncome Rider	Annual Savings	Note that ente	red value	es WILL NOT roll down	to following year	s when blank

Step 21: Start Year of X Years: Click on the green button Start Year for X Years.

				,	YOUR CASE LIST SET	TINGS HELP
Manage Accou	nt					
Account name	Checking/Savings	Structured Income Type			Income [Data
Initial account balance	\$100,000	Income Riders	ADD INCOME	Yea	r Income	Variable
the advantage of the second		 Start payout from income rider 		2		
Hypothetical return	0.01 %		Pick year(s)	3		
Bonus	0.0 %	Liquidate or annuitize	OR	4		
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan	5		
Account description			OR	6		
Optional account company		 Liquidate account (in so many years) 				
Other			Start year for X years	9		
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	10	10		
		Annual fixed withdrawal	Pick year(s) to remove	11		
Add money later - deferred account /ears deferred		Annual percentage withdrawal -2 %	Pick year(s) to remove	12		
ears deterred	0			14		
Asset plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan	15		
Risk level	Circuit Internet	 Beneficial IRA RMD (based on beneficiaries life) 		16		
	Fixed Interest			17		
Account owner	~	Calculated Plan Withdrawals	Reset all years	10		
Account type	NQ	Make-up total owners RMD from one account		20		
Add an income rider	123 			21		
Based on 🔘 age 🔿	Client2 's age O Joint	 Make-up total benef RMD from one account 		22		
Select income rider	~	 Make-up income gap based on target income 		23		
Number of months of payout in first	year 12.0					
Enter manual payout 🗍		Annual Savings				
		Annual fixed savings				
Request Additional Rider Remove	Income Rider					
Orange backgrounds indicate h	hypothetical returns		Note that ente	red values	WILL NOT roll down to	following years

Step 22: Clicking: After clicking on the Start Year for X Years button, the term "percent" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

					YOUR C	ASE LIST	SETTINGS HELP	SIGN OUT
Manage Accour	nt						1	
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Checking/Savings	Structured Income Type				Incom	e Data	
Initial account balance	\$100,000	Income Riders	ADD INCOME		Year	Income	Variable	
		 Start payout from income rider 			1			
Hypothetical return	0.01 %		Pick year(s)		3			
Bonus	0.0 %		OR		4			
Optional		Liquidate or annuitize Annuitize (for years certain) 1.0 %	Start year for rest of plan		5		*	
Account description			OR		6 7	norcont	-2.0	
Optional account company		 Liquidate account (in so many years) 			8	percent	-2.0	
Other			Start year for X years		9	percent	-2.0	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10	percent	-2.0	
	rax meene biombalene (adamee)	Annual fixed withdrawal	Pick year(s) to remove		11	percent	-2.0	
Add money later - deferred account Years deferred		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12 13	percent	-2.0	
reals deletted	0	Required minimum distribution (RMD)			14	percent	-2.0	
Asset plan allocation	Fixed Interest Sel		Remove year to end of plan		15	percent	-2.0	
Risk level	Fixed Interest	 Beneficial IRA RMD (based on beneficiaries life) 			16	percent	-2.0	
	The interest		Reset all years		17 18			
Account owner	~	Calculated Plan Withdrawals	Reset an years		19			
Account type	NQ ~	Make-up total owners RMD from one account			20			
Add an income rider		 Make-up total benef RMD from one account 			21			
Based on 🥥 age 🔾	Client2 's age 🔘 Joint				22 23			
Select income rider	~	O Make-up income gap based on target income			24			-
Number of months of payout in first ye	ear 12.0							- F
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	ncome Rider							
Orange backgrounds indicate hy	pothetical returns		Note that enter	ed val	ues WILL I	NOT roll down	to following years v	vhen blank

Step 23: Save: Click on the green button Save underneath the Manage Account subheading.

					YOUR	CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accoun)†							
	View / Edit Death Benefit View / Edit Actual Values							
Ac ount name	Checking/Savings	Structured Income Type				Income [Data	
Initial account balance	\$100,000	Income Riders	ADD INCOME		Year 1	Income	Variable	-
Hypothetical return		 Start payout from income rider 	6		2			
Hypothetical leturi	0.01 %		Pick year(s)	ŏ	3			
Bolius	0.0 %	Liquidate or annuitize	- ON		4			
Op ional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
account description		O Liquidate account (in so many years)	OR		7	percent	-2.0	
Optional account company Other			Start year for X years		8	percent	-2.0	
					9 10	percent	-2.0	
Ta: calculation option	Tax Income Distributions (Qualified) \checkmark	Withdrawals			11	percent	-2.0	
Ad money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		12	percent	-2.0	
Years deferred	0	Annual percentage withdrawal 0.0 %			13	percent	-2.0	
As let plan allocation	Fixed Interest Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		14 15	percent	-2.0	
		 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end or plan		16	percent	-2.0	
Ristlevel	Fixed Interest				17			
Actiount owner	~		Reset all years		18			
Account type	NQ	Calculated Plan Withdrawals Make-up total owners RMD from one account			19 20			
Add an income rider	NQ V				21			
Based on 🔘 age 🔘 (Client2 's age 🔘 Joint	 Make-up total benef RMD from one account 			22			
Select income rider	~	O Make-up income gap based on target income			23 24			-
Number of months of payout in first ye	ear 12.0				1950			•
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	come Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to	following years w	hen blank

Step 24: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

												YOUR CASE LIST SETTINGS	HELP
												PREPARED BY:	
												INITIAL PLAN DATE:	
CLIENT DASHBO	ARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS T	OOLS REVISED PLAN DATE:	
New years	una al lu				_								
Structu	urea II	ncom	e Plar	ining	_								
Edit Save C	ancel Add	Account Add	Income A	d Inc Tax A	Add Ta get I		enario Disp	lay Options					
Scenario Dep	ositing mone	from a check	ing/savings	account annu	al percentage		~						
ocp	obiting mone;	inom a chech	ang/ournigo		ai pertentage								
					×								
			Acco	unts	⁽¹⁾								
Planning Forizon	20 years ∨	. i	RA	Checkir	ng/Savings			Inco	mes 📈				
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year		
net return	63	4.00 %	IRA	0.01 %		TOTAL	Distribution	wayes		ncome			
initial amount		1,000,000		100,000		1,100,000	Subtotal	Manage	Manage				
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor				
w/bonus		1,000,000	Manage	100,000	Manage	1,100,000	incomes	3.20 %	3.20 %				
end of 1 end of 2	64 65	1,040,000 1,081,600	0	100,010 100,020	0	1,140,010 1,181,620	0	175,000 180,600	0	175,000 180,600	end of 1 end of 2		
end of 2 end of 3	66	1,124,864	0	100,020	0	1,181,620	0	180,600	0	180,600	end of 2 end of 3		
end of 4	67	1,169,858	0	100,030	ő	1,269,898	0	192,343	0	192,343	end of 4		
end of 5	68	1,216,653	0	100,050	0	1,316,703	0	198,498	0	198,498	end of 5		
end of 6	69	1,265,319	0	100,060	0	1,365,379	0	204,850	0	204,850	end of 6		
end of 7	70	1,315,931	0	102,071	(2,001)	1,418,003	(2,001)	0	80,386	78,385	end of 7		
end of 8	71	1,368,569	0	104,123	(2,041)	1,472,692	(2,041)	0	82,958	80,917	end of 8		
end of 9 end of 10	72 73	1,423,311 1,480,244	0	106,216 108,351	(2,082)	1,529,527 1,588,594	(2,082) (2,124)	0	85,613 88,353	83,531 86,228	end of 9 end of 10		
end of 10 end of 11	73	1,480,244	0	1108,351	(2,124) (2,167)	1,588,594	(2,124)	0	91,180	86,228	end of 10 end of 11		
end of 12	75	1,601.032	0	112,750	(2,107)	1,713,782	(2,107)	0	94,098	91,887	end of 12		
end of 13	76	1,665,073	0	115,016	(2,255)	1,780,089	(2,255)	0	97,109	94,854	end of 13		
end of 14	77	1,731,676	0	117,328	(2,300)	1,849,004	(2,300)	0	100,216	97,916	end of 14		
end of 15	78	1,800,943	0	119,687	(2,347)	1,920,629	(2,347)	0	103,423	101,077	end of 15		
end of 16	79	1,872,980	0	122,092	(2,394)	1,995,073	(2,394)	0	106,733	104,339	end of 16		
end of 17	80	1,947,900	0	122,104	0	2,070,004	0	0	110,148	110,148	end of 17		
end of 18 end of 19	81 82	2,025,815 2,106,848	0	122,117 122,129	0	2,147,932 2,228,977	0	0	113,673 117,310	113,673 117,310	end of 18 end of 19		
end of 19 end of 20	83	2,106,848	0	122,129	0	2,228,977	0	0	121,064	121,064	end of 20		
5112 51 20	10		0		(21,923)	2,2 .0,200	(21,923)	1,137,671	1,392,264	2,508,012			

Step 25: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

												YOUR CASE LIST SETTINGS
												PREPARED BY
												INITIAL PLAN DATE
INT DASHB	OARD STRU	ICTURED INCOM	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR /	SSET ALLOCAT	ION AND NET	WORTH G	RAPHS R	EPORTS T	00LS REVISED PLAN DATE
ruct	ured Ir	noom		ning								
Save	Cancel Add A	ccount Add	Income A	dd Inc Tax A	dd Target	Edit or Add So	enario Disp	lay Options				
De	positing money	from a check	ing/savings	account annua	al percentage		~					
	l l				a ^{ld}							
			Acco	unts				_				
ning zon	20 years ∨	1	RA	Checkin	g/Savings			Inco	mes 📈			
Yea	T - 1	Account	Income	Account	Income	Accounts	Planned		ss	Total	Year	
et re um	63	4.00 %	IRA	0.01 %	income	Total	Distribution	Wages	55	Income	Tear	
ial ar jount		1,000,000	INA	100,000		1,100,000	Subtotal	Manage	Manage			
onu %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor			
v/bo us		1,000,000	Manage	100,000	Manage	1,100,000	incomes	3.20 %	3.20 %			
end c 1	64	1,040,000	0	100,010	0	1,140,010	0	175,000	0	175,000	end of 1	
end c 2	65	1,081,600	0	100,020	0	1,181,620	0	180,600	0	180,600	end of 2	
end of 3	66	1,124,864	0	100,030	0	1,224,894	0	186,379	0	186,379	end of 3	
end c 4	67	1,169,858	0	100,040	0	1,269,898	0	192,343	0	192,343	end of 4	
end of 5	68	1,216,653	0	100,050	0	1,316,703	0	198,498	0	198,498	end of 5	
end c 6	69 70	1,265,319 1,315,931	0	100,060	0	1,365,379	(2001)	204,850	0	204,850	end of 6 end of 7	
end c 7 end c 8	70	1,315,931	0	102,071 104,123	(2,001) (2,041)	1,418,003 1,472,692	(2,001) (2,041)	0	80,386 82,958	78,385 80,917	end of 7 end of 8	
end of 9	72	1,423,311	0	106,216	(2,041)	1,472,692	(2,041)	0		83,531	end of 9	
nd o 10	73	1,423,311	0	108,351	(2,002)	1,529,527	(2,002)	0		86,228	end of 10	
nd of 11	74	1,539,454	0	110,529	(2,167)	1,649,982	(2,167)	0		89,013	end of 11	
nd of 12	75	1,601,032	0	112,750	(2,211)	1,713,782	(2,211)	0		91,887	end of 12	
nd of 13	76	1,665,073	0	115,016	(2,255)	1,780,089	(2,255)	0		94,854	end of 13	
nd of 14	77	1,731,676	0	117,328	(2,300)	1,849,004	(2,300)	0	100,216	97,916	end of 14	
nd of 15	78	1,800,943	0	119,687	(2,347)	1,920,629	(2,347)	0	103,423	101,077	end of 15	
nd of 16	79	1,872,980	0	122,092	(2,394)	1,995,073	(2,394)	0	106,733	104,339	end of 16	
nd of 17	80	1,947,900	0	122,104	0	2,070,004	0	0	110,148	110,148	end of 17	
nd of 18	81	2,025,815	0	122,117	0	2,147,932	0	0		113,673	end of 18	
nd of 19	82	2,106,848	0	122,129	0	2,228,977	0	0		117,310	end of 19	
nd of 20	83	2,191,122	0	122,141	0	2,313,263	0	0	121,064	121,064	end of 20	
	-		0		(21,923)		(21,923)	1,137,671	1,392,264	2,508,012		
Orange	ackgrounds inc	licate hypothe	etical returns									

Step 26: 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
												PREPARED BY
												INITIAL PLAN DATE
IENT DASHB	DARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS T	
truct	ured I	ncom	e Plar	nina								
			0 1 101	iiiiig								
lit Dynam	c Mode											
enario De	ositing mone	y from a check	king/savings	account annu	al percentage		~					
			9	1	24							
			Acco	ounts	<u></u>							
nning	20 years 🗸			Ohashia					7 ^k			
izon			RA	Checkin	ng/Savings			Inco	mes		<u></u>	
Year		Account	Income	Account	Income	Accounts	Planned		2 SS	Total	Year	
net return	63	4.00 %	IRA	0.01 %		Total	Distribution	Wages		Income	0.000	
tial amount	00	1,000,000	104	100,000		1,100,000	Subtotal					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor			
w/bonus		1,000,000		100,000		1,100,000	incomes	3.20 %	3.20 %			
end of 1	64	1,040,000	0	100,010	0	1,140,010	0	175,000	0	175,000	end of 1	
end of 2	65	1,081,600	0	100,020	0	1,181,620	0	180,600	0	180,600	end of 2	
end of 3	66	1,124,864	0	100,030	0	1,224,894	0	186,379	0	186,379	end of 3	
end of 4	67	1,169,858	0	100,040	0	1,269,898	0	192,343	0	192,343	end of 4	
end of 5	68	1,216,653	0	100,050	0	1,316,703	0	198,498	0	198,498	end of 5	
end of 6	69	1,265,319	0	100,060	0	1,365,379	0	204,850	0	204,850	end of 6	
end of 7	70	1,315,931	0	102,071	(2,001)	1,418,003	(2,001)	0	80,386	78,385	end of 7	
end of 8	71	1,368,569	0	104,123	(2,041)	1,472,692	(2,041)	0	82,958	80,917	end of 8	
end of 9	72	1,423,311	0	106,216	(2,082)	1,529,527	(2,082)	0	85,613	83,531	end of 9	
end of 10	73	1,480,244	0	108,351	(2,124)	1,588,594	(2,124)	0	88,353	86,228	end of 10	
end of 11 end of 12	74 75	1,539,454	0	110,529	(2,167)	1,649,982	(2,167)	0	91,180	89,013	end of 11	
end of 12 end of 13	75	1,601,032 1,665,073	0	112,750 115,016	(2,211) (2,255)	1,713,782	(2,211) (2,255)	0	94,098 97,109	91,887 94,854	end of 12 end of 13	
end of 14	77	1,731,676	0	117,328	(2,255)	1,849,004	(2,255)	0	100,216	94,034	end of 13 end of 14	
end of 15	78	1,800,943	0	119,687	(2,347)	1,920,629	(2,347)	0	103,423	101,077	end of 15	
end of 16	79	1,872,980	0	122,092	(2,394)	1,995,073	(2,394)	0	106,733	104,339	end of 16	
end of 17	80	1,947,900	0	122,104	0	2,070,004	0	0	110,148	110,148	end of 17	
	81	2,025,815	0	122,117	0	2,147,932	0	0	113,673	113,673	end of 18	
end of 18	82	2,106,848	0	122,129	0	2,228,977	0	0	117,310	117,310	end of 19	
end of 18 end of 19					0	2,313,263	0	0	121.064	121,064	end of 20	
end of 18	82	2,191,122	0	122,141	(21,923)	2,313,203	(21,923)	1,137,671	1,392,264	2,508,012	010 01 20 1	

Step 27: 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
												PREPARED BY
												INITIAL PLAN DATE
CLIENT DASHBOA	RD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS T	DOLS REVISED PLAN DATE
			-									
Structu	ired li	ncom	e Plar	nning								
dit Save Ca	incel Add A	Account Add	Income A	dd Inc Tax	Add Target	Edit or Add So	enario Disp	lav Options				
Scenario Depo	ting money	from a check	ing/savings	account annu	al nercentare		~					
Debo	ang mone,	nom a chech	ang/ournigo		arpercentage							
			Acco	unto	×							
			ACCO	units	8.				-			
lanning 2 lorizon	years 🗸	1	RA	Checkin	g/Savings			Inco	mes 📈			
						Accounts	Planned			Total		
Year		Account	Income	Account	Income	Total	Distribution	Wages	SS	Income	Year	
net return initial amount	63	4.00 %	IRA	0.01 %		1,100,000	Subtotal	Manager				
bonus %		0.00 %		0.00 %		1,100,000	of account	Manage Infl Factor	Manage Infl Factor			
w/bonus		1.000.000	Manage	100.000	Manage	1,100,000	incomes	3.20 %	3.20 %			
end of 1	64	1,040,000	0	100,010	0	1,140,010	0	175,000	0	175,000	end of 1	
end of 2	65	1,081,600	0	100,020	0	1,181,620	0	180,600	0	180,600	end of 2	
end of 3	66	1,124,864	0	100,030	0	1,224,894	0	186,379	0	186,379	end of 3	
end of 4	67	1,169,858	0	100,040	0	1,269,898	0	192,343	0	192,343	end of 4	
end of 5	68	1,216,653	0	100,050	0	1,316,703	0	198,498	0	198,498	end of 5	
end of 6 end of 7	69 70	1,265,319 1,315,931	0	100,060 102,071	0 (2,001)	1,365,379 1,418,003	0 (2,001)	204,850	0 80,386	204,850 78,385	end of 6 end of 7	
end of 8	71	1,368,569	0	104,123	(2,001)	1,472,692	(2,001)	0	82,958	80,917	end of 8	
end of 9	72	1,423,311	0	106,216	(2,082)	1,529,527	(2,082)	0	85,613	83,531	end of 9	
end of 10	73	1,480,244	0	108,351	(2,124)	1,588,594	(2,124)	0	88,353	86,228	end of 10	
end of 11	74	1,539,454	0	110,529	(2,167)	1,649,982	(2,167)	0	91,180	89,013	end of 11	
end of 12	75	1,601,032	0	112,750	(2,211)	1,713,782	(2,211)	0	94,098	91,887	end of 12	
end of 13	76	1,665,073	0	115,016	(2,255)	1,780,089	(2,255)	0	97,109	94,854	end of 13	
end of 14	77	1,731,676	0	117,328	(2,300)	1,849,004	(2,300)	0	100,216	97,916	end of 14	
end of 15	78	1,800,943	0	119,687	(2,347)	1,920,629	(2,347)	0	103,423	101,077	end of 15	
end of 16 end of 17	79 80	1,872,980 1,947,900	0	122,092 122,104	(2,394)	1,995,073 2,070,004	(2,394)	0	106,733 110,148	104,339 110,148	end of 16 end of 17	
end of 17 end of 18	80	2.025.815	0	122,104	0	2,070,004	0	0	113,673	113,673	end of 17 end of 18	
end of 19	82	2,025,815	0	122,117	0	2,147,932	0	0	117,310	117,310	end of 19	
end of 20	83	2,191,122	0	122,141	0	2,313,263	0	0	121,064	121,064	end of 20	
			0		(21,923)		(21,923)	1,137,671	1,392,264	2,508,012		
			etical returns	c								

Step 28: 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
												PREPARED B
												INITIAL PLAN DAT
CLIENT DASHBO	DARD STR	UCTURED INCOM	ME PLANNING	CASH FLC	W AND TAX A	DVISOR /	ASSET ALLOCAT	TION AND NET	WORTH G	RAPHS R	EPORTS T	00LS REVISED PLAN DAT
Struct	ured I	ncom	Plan	nina								
Edit Dynamic		100111		innig								
Dynamic	c Mode											
Scenario Dep	ositing mone	y from a check	ing/savings	account annua	al percentage		~					
			Acco	unts	×							
Planning Horizon	20 years 🗸	i i	IRA		Checking/Savings				Incomes 🗡			
Year	1000	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	c SS	Total Income	Year	
net return	63	4.00 %	IRA	0.01 %	proprieta do sel de la	TULdi	DISTIDUTION	wayes		moome		
initial amount		1,000,000		100,000		1,100,000	Subtotal					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor			
w/bonus		1,000,000		100,000		1,100,000	incomes	3.20 %	3.20 %			
end of 1	64	1,040,000	0	100,010	0	1,140,010	0	175,000	0	175,000	end of 1	
end of 2	65	1,081,600	0	100,020	0	1,181,620	0	180,600	0	180,600	end of 2	
end of 3	66	1,124,864	0	100,030	0	1,224,894	0	186,379	0	186,379	end of 3	
end of 4	67	1,169,858	0	100,040	0	1,269,898	0	192,343	0	192,343	end of 4	
end of 5	68	1,216,653	0	100,050	0	1,316,703	0	198,498	0	198,498	end of 5	
end of 6	69	1,265,319	0	100,060	0	1,365,379	0	204,850	0	204,850	end of 6	
end of 7	70	1,315,931	0	102,071	(2,001)	1,418,003	(2,001)	0	80,386	78,385	end of 7	
end of 8	71	1,368,569	0	104,123	(2,041)	1,472,692	(2,041)	0	82,958	80,917	end of 8	
end of 9	72	1,423,311	0	106,216	(2,082)	1,529,527	(2,082)	0	85,613	83,531	end of 9	
end of 10	73	1,480,244	-	108,351	(2,124)	1,588,594	(2,124)	0	88,353	86,228	end of 10	
end of 11 end of 12	74 75	1,539,454 1,601,032	0	110,529 112,750	(2,167)	1,649,982	(2,167)	0	91,180	89,013	end of 11	
end of 12 end of 13	75	1,601,032	0		(2,211) (2,255)	1,713,782	(2,211) (2,255)	0	94,098 97,109	91,887 94,854	end of 12 end of 13	
end of 13 end of 14	76	1,665,073	0	115,016 117,328	(2,255) (2,300)	1,780,089	(2,255) (2,300)	0	97,109	94,854 97,916	end of 13 end of 14	
end of 14 end of 15	78	1,800,943	0	119,687	(2,300)	1,849,004	(2,300) (2,347)	0	100,216	101,077	end of 14 end of 15	
end of 15 end of 16	78	1,800,943	0	122,092				0				
end of 16 end of 17	80	1,872,980	0	122,092	(2,394)	1,995,073 2,070,004	(2,394)	0	106,733 110,148	104,339 110,148	end of 16 end of 17	
end of 17 end of 18	80	2.025,815	0	122,104	0	2,070,004	0	0	113,673	113,673	end of 17 end of 18	
end of 19	82	2,025,615	0	122,129	0	2,147,932	0	0	117,310	117,310	end of 19	
end of 20	83	2,191,122	0	122,123	0	2,313,263	0	0	121,064	121,064	end of 20	
Circ 01 20	1 33	4,171,166	0	166,141	(21,923)	2,010,200	(21,923)	1,137,671	1,392,264	2,508,012	Circ 01 20	
_			etical returns		(21,920)		(21,920)	1,137,071	1,072,204	2,000,012		

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