Creating an IRA Account from the Structured Income Planning Page

11/08/2024 1:15 pm EST

From the Structured Income Planning page, you have the capacity to add many different forms of accounts to the structured income plan. Below is a step-by-step guide for creating an IRA account from the structured income planning page.



														YOUR CASE LIST	SETTING
															PREPARI
															INITIAL PLAN
IENT DASHBOA	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	SSET ALLOCAT	TION AND NET	WORTH 0	RAPHS	REPORTS	TOOL	S	F	REVISED PLAN
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		ICOIII	eriai	innig											
it Dynamic	Mode														
enario Creat	ting an IRA A	ccount from t	he SIP Page				~								
		Acco	unts 🔊 🖉												
nning	20 years 🗸			1			×								
rizon	, yours	Sa	vings			Inco	mes 🎢								
Year		Account	Income	Accounts	Planned		SS	Total	Year						
net return	50	0.01 %		Total	Distribution	Wages		Income							
tial amount	50	29,000		29,000	Subtotal										
bonus %		0.00 %		0	of account	Infl Factor	Infl Factor								
w/bonus		29,000		29,000	incomes	2.20 %	3.20 %								
end of 1	51	29,003	0		0	80,000	0	80,000	end of 1						
end of 2	52	29,006	0		0	81,760	0	81,760	end of 2						
end of 3	53	29,009	0	29,009	0	83,559	0	83,559	end of 3						
end of 4	54	29,012	0	29,012	0	85,397	0	85,397	end of 4						
end of 5	55 56	29,015	0	29,015	0	87,276		87,276	end of 5						
end of 6 end of 7	56	29,017 29,020	0	29,017 29,020	0	89,196 91,158	0	89,196 91,158	end of 6 end of 7						
end of 8	57	29,020	0	29,020	0	91,150	0	91,150	end of 7						
end of 9	59	29,025	0	29,025	0	95,213	0	95,213	end of 9						
end of 10	60	29,029	0	29,029	0	97,308	0	97,308	end of 10						
end of 11	61	29,022	0		0	99,449	0	99,449	end of 11						
end of 12	62	29,035	0	29,035	Ő	101,636	Ő	101,636	end of 12						
end of 13	63	29,038	0	29,038	0	103,872	0	103,872	end of 13						
end of 14	64	29,041	0	29,041	0	106,158	0	106,158	end of 14						
end of 15	65	29,044	0	29,044	0	0	32,661	32,661	end of 15						
end of 16	66	29,046	0		0	0	33,706	33,706	end of 16						
end of 17	67	29,049	0	29,049	0	0	34,785	34,785	end of 17						
	68	29,052	0	29,052	0	0	35,898	35,898	end of 18						
end of 18	69	29,055	0	29,055	0	0	37,047	37,047	end of 19						
end of 19	A 42 4 4 5		0	29,058	0	0	38,232	38,232	end of 20						
	70	29,058	0		0	1,295,145	212,328	1,507,474							

Step 2: Add Account: Click on the green add account underneath the Structured Income Planning subheading.

															YOUR CASE	LIST	SETTINGS	HELP	SIG	GN O
																1	PREPARED	BY:		
																INITL	AL PLAN D	ATE:		
CLIENT DASHBO	ARD STRU	CTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCAT	TION AND NET	WORTH	GRAPHS	S REF	PORTS	TOOLS			REVISI	D PLAN D	ATE:		
Structu	ired Ir	ncom	e Plar	nina																
	ancel Add A				Add Target	Edit or Add Se	cenario Disp	lay Options												
Call Gave 0					Add Target		Disp	luy options												
Scenario Crea	ating an IRA A	count from t	he SIP Page				~													
		-		í																
		Acco	unts 🔊																	
Planning Horizon	20 years ∨	Sa	vings			Inco	mes 🔎													
Year		Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year]										
net return	50	0.01 %								1										
initial amount bonus %		29,000 0.00 %		29,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor													
w/bonus		29,000	Manage	29,000	incomes	2.20 %	3.20 %													
end of 1	51	29,003	0	29,003	0	80,000	0	80,000	end of 1	1										
end of 2	52	29,006	0	29,006	0	81,760	0	81,760	end of 2											
end of 3	53	29,009	0	29,009	0	83,559	0	83,559	end of 3											
end of 4 end of 5	54 55	29,012 29.015	0	29,012 29,015	0	85,397 87,276	0	85,397 87,276	end of 4 end of 5											
end of 6	56	29,013	0	29,013	0	89,196	0	89,196	end of 6											
end of 7	57	29,020	0	29,020	ő	91,158	ő	91,158	end of 7											
end of 8	58	29,023	0	29,023	0	93,164	0	93,164	end of 8											
end of 9	59	29,026	0	29,026	0	95,213	0	95,213	end of 9											
end of 10	60	29,029	0	29,029	0	97,308	0	97,308	end of 10											
end of 11	61	29,032	0	29,032	0	99,449	0	99,449	end of 11	T										
end of 12	62 63	29,035	0	29,035	0	101,636	0	101,636	end of 12											
end of 13 end of 14	63	29,038 29,041	0	29,038 29,041	0	103,872 106,158	0	103,872 106,158	end of 13 end of 14											
end of 15	65	29,041	0	29,041	0	0	32,661	32,661	end of 14											
end of 16	66	29,046	0	29,046	0	0	33,706	33,706	end of 16	1										
end of 17	67	29,049	0	29,049	0	0	34,785	34,785	end of 17	1										
end of 18	68	29,052	0	29,052	0	0	35,898	35,898	end of 18											
end of 19	69	29,055	0	29,055	0	0	37,047	37,047	end of 19											
end of 20	70	29,058	0	29,058	0	0	38,232	38,232	end of 20											
	_		0		0	1,295,145	212,328	1,507,474												
Orange ba	ickgrounds ind	licate hypothe	etical returns	2																

Step 3: Account Name: Filter in the account name.

				YOU	IR CASE LIST SET	TINGS HELP	SIGN OU
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name		Structured Income Type			Income D	ata	
Initial account balance		Income Riders	ADD INCOME	Year	Income	Variable	-
Hypothetical return	0.0 %	 Start payout from income rider 	Pick year(s)	2			
Bonus			OR	3			
Bonus	0.0 %	Liquidate or annuitize		5			
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR	6			
Account description Optional account company		 Liquidate account (in so many years) 	UK	7			
Other			Start year for X years				
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
	Tax moone Distributions (Qualified)	Annual fixed withdrawal	Pick year(s) to remove	11			
Add money later - deferred account Years deferred		Annual percentage withdrawal 0.0 %	Pick year(s) to remove	12			
	0	Required minimum distribution (RMD)	-	14			
Asset plan allocation	none Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	15			
Risk level		Benencial IKA Kino (based on benencialles ine)		16			
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			
	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 ye	ear 12.0			4			•
Enter manual payout		Annual Savings					
		Annual fixed savings					
	ncome Rider						
Orange backgrounds indicate hy	pothetical returns		Note that enter	red values WI	LL NOT roll down to	following years w	nen blank

Step 4: Initial Account Balance: Filter in the monetary amount into the Initial account balance text box. Putting in a comma is optional, SIPS recognizes both formats.

					YOUR CASE	LIST SETTING	S HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income Data		
Initial account balance		Start payout from income rider	ADD INCOME		Year I 1	ncome	Variable	*
Hypothetical return	0.0 %	Start payout norm income rider	Pick year(s)		2			
Bonus	0.0 %		OR		3			
	0.0	Liquidate or annuitize			5			
Optional Account description		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR		6			
Optional account company		 Liquidate account (in so many years) 			7			
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	O Annual percentage withdrawal 0.0 %			13			
Asset plan allocation	none Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		14 15			
Disk land		O Beneficial IRA RMD (based on beneficiaries life)			16			
Risk level					17 18			
Account owner	~	Calculated Plan Withdrawals	Reset all years		19			
Account type	NQ ~	Make-up total owners RMD from one account			20			
Add an income rider		O Make-up total benef RMD from one account			21 22			
the second se	Client2 's age O Joint	Make-up income gap based on target income			23			
Select income rider Number of months of payout in first ye	~			-	24			• •
Enter manual payout	ear 12.0							
		Annual Savings						
Request Additional Rider Remove In	ncome Rider	Annual fixed savings						
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red valu	ues WILL NO	roll down to follo	wing years wh	nen blank

Step 5: Hypothetical Return: Enter in the numeric hypothetical return. If there is not hypothetical return this box can be left at the default amount of zero.

					YOUR	CASE LIST SETTIN	GS HELP	SIGN OUT
Manage Accoun	t							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income Data		
Initial account balance	1,000,000	Income Riders	ADD INCOME		Year	Income	Variable	*
		 Start payout from income rider 			1			
Hypothetical return	0.0 %		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		6			
Optional account company		C Elquidate account (in so many years)			8			
Other			Start year for X years	ŏ	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		11 12			
Years deferred	0	Annual percentage withdrawal 0.0 %			13			
		 Required minimum distribution (RMD) 	Netter St. Marketing		14			
Asset plan allocation	none Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15 16			
Risk level					17			
Account owner	~		Reset all years	ŏ	18			
		Calculated Plan Withdrawals			19			
Account type	NQ ~	 Make-up total owners RMD from one account 			20 21			
Add an income rider	Client2 's age O Joint	O Make-up total benef RMD from one account			22			
		O Make-up income gap based on target income			23			
Select income rider Number of months of payout in first ye	~			-	74			
Enter manual payout	ar 12.0							
		Annual Savings						
Request Additional Rider Remove In	come Rider	Annual fixed savings						
Orange backgrounds indicate hyp	othetical returns		Note that enter	red va	lues WILL	NOT roll down to foll	owing years wi	hen blank

Step 6: Bonus: If the account has a bonus percentage on it, enter the numeric amount in the text box next to Bonus. If there is no bonus this text box can be left blank.

				YOUR C.	ASE LIST SETTIN	GS HELP	SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income Data		
Initial account balance	\$1,000,000	Income Riders O Start payout from income rider	ADD INCOME	Year 1	Income	Variable	
Hypothetical return	6 %		Pick year(s)	2			
Bonus	0.0 %	Liquidate or annuitize	OR	4			
Optional Account description Optional account company		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR	5 6 7 8			L
Other Tax calculation option Add money later - deferred account	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal	Start year for X years 0 Pick year(s) to remove	9 10 11 12			L
Years deferred Asset plan allocation	0 none Se	Annual percentage withdrawal 0,0 % Required minimum distribution (RMD)	Remove year to end of plan	13 14 15			
Risk level	n/a	 Beneficial IRA RMD (based on beneficiaries life) 		16			
Account owner Account type Add an income rider Based on age Select income rider Number of months of payout in first y	NQ V Client2's age O Joint ear 12.0	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	18 19 20 21 22 23 24			*
Enter manual payout	ncome Rider pothetical returns	Annual Savings	Note that enter	red values WILL I	NOT roll down to foll	owing years wh	nen blank

Step 7: Tax Calculation Option: Click on the down carrot arrow in the text box. Select which tax option correlates with the account.

				Y	OUR CASE LIST	SETTINGS HE	LP SIGN OUT
Manage Account							
Save Cancel View / Edit Income View / Edit Death Ben	efit View / Edit Actual Values						
Account name IRA		Structured Income Type			Inco	me Data	
Initial account balance \$1,000,000		Income Riders	ADD INCOME	Yea	Income	Variable	ê 🔺
Hypothetical return 6 %		 Start payout from income rider 	P (4)	2			
			Pick year(s) OR	3			
Bonus 0.0 %		Liquidate or annuitize		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	7			
Other			Start year for X years				
Tax calculation option Tax Income Distrib	utions (Qualified)	Withdrawals	0	10			
		Annual fixed withdrawal	Pick year(s) to remove	11			
Add money later - deferred account Years deferred 0	T	O Annual percentage withdrawal 0.0 %		13			
		Required minimum distribution (RMD)		14			
Asset plan allocation none	Sel	 Beneficial IRA RMD (based on beneficiaries life) 	Remove year to end of plan	15			
Risk level n/a				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		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 		2 24			-
Number of months of payout in first year	12.0						<i>P</i>
Enter manual payout		Annual Savings					
Request Additional Rider Remove Income Rider		Annual fixed savings					
Orange backgrounds indicate hypothetical returns			Note that ente	red values	WILL NOT roll dow	n to following year	s when blank

Step 8: Asset Plan Allocation: Click on the green Sel button and select which asset location correlates with the account. Once you pick the asset location the text box underneath in the risk level will automatically change to correlate to the asset plan allocation.

				YOU	JR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Incol	me Data	
Initial account balance	\$1,000,000	Income Riders O Start payout from income rider	ADD INCOME	Year 1	Income	Variable	A
Hypothetical return	6.0 %		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		O Liquidate account (in so many years)	OR	7			
Optional account company Other			Start year for X years	8			
				9			
Tax calculation option	Do not Tax (Roth) ~	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	none	 Required minimum distribution (RMD) 	Remove year to end of plan	14			
		 Beneficial IRA RMD (based on beneficiaries life) 		16			
Risk level	n/a			17			
Account 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			21			
Distance in the second s	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 y	year 12.0			4			•
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove	Income Rider						
Orange backgrounds indicate h	ypothetical returns		Note that enter	red values W	ILL NOT roll dow	n to following years v	vhen blank

Step 9: Account Owner: Click on the down carrot arrow and select which owner.

					YOUR	CASE LIST SETT	INGS HELP	SIGN OUT
Manage Accourt	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$1,000,000	Income Riders	ADD INCOME		Year	Income	Variable	*
1		 Start payout from income rider 			1			
Hypothetical return	6.0 %		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		6 7			
Optional account company		O Elquidate account (in so many years)			8			
Other			Start year for X years	Ö	9			
Tax calculation option	Do not Tax (Roth)	Withdrawals	0		10			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		11 12			
Years deferred	0	O Annual percentage withdrawal 0.0 %			13			
		Required minimum distribution (RMD)			14			
Asset plan allocation	Aggressive Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15 16			
Risk level	Aggressive	Definition from the (based of beneficialies file)			10			
Account owner	~		Reset all years		18			
		Calculated Plan Withdrawals	<u> </u>		19			
Account type	NQ ~	 Make-up total owners RMD from one account 			20 21			
Add an income rider	Client2 's age 🔘 Joint	O Make-up total benef RMD from one account			22			
Based on age C Select income rider		O Make-up income gap based on target income			23			
Number of months of payout in first ye				-	24			
Enter manual payout	12.0							
enter manual payour		Annual Savings						
Request Additional Rider Remove In	come Rider	Annual fixed savings						
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	alues WILL	NOT roll down to f	ollowing years w	hen blank

Step 10: Account Type: Click on the dropdown carrot arrow and select what type of account you are filtering in.

					YOUR	CASE LIST S	ETTINGS	HELP	SIGN OUT
Manage Accour	nt								
	View / Edit Death Benefit View / Edit Actual Values								
Account name	IRA	Otructured Income Tune				Income	Data		
Initial account balance	\$1,000,000	Structured Income Type Income Riders	ADD INCOME		Year	Income	0.00.00.00	/ariable	
mittal account balance	\$1,000,000	 Start payout from income rider 			1				
Hypothetical return	6.0 %		Pick year(s)		2				
Bonus	0.0 %		OR		4				
		Liquidate or annuitize Annuitize (for years certain) 1.0 %	Start year for rest of plan		5				
Optional Account description			OR		6				
Optional account company		 Liquidate account (in so many years) 			7				
Other			Start year for X years		9				
Tax calculation option	Devel Terr (Deth)	Withdrawals	0		10				
rax calculation option	Do not Tax (Roth) ~	Annual fixed withdrawal			11				
Add money later - deferred account			Pick year(s) to remove		12				
Years deferred	0				13 14				
Asset plan allocation	Aggressive Sel	 Required minimum distribution (RMD) 	Remove year to end of plan		15				
21.1.1.1		 Beneficial IRA RMD (based on beneficiaries life) 			16				
Risk level	Aggressive				17				
Account owner	~		Reset all years		18 19				
Account type	NQ	Calculated Plan Withdrawals Make-up total owners RMD from one account			20				
Add an income rider					21				
	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 y					/4				
Enter manual payout		Annual Onderson							
		Annual Savings							
Request Additional Rider Remove In	ncome Rider								
Orange backgrounds indicate hy	pothetical returns		Note that enter	red va	lues WILL	NOT roll down	o followir	ng years wh	en blank

Step 11: Add an Income Rider, Based On: Click on which radio button this account correlates with.

					YOUR CASE	LIST SETTING	S HELP	SIGN OUT
Manage Accour)†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income Data		
Initial account balance	\$1,000,000	Income Riders	ADD INCOME			ncome	Variable	*
		 Start payout from income rider 			1			
Hypothetical return	6.0 %		Pick year(s)		3			
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		6			
Optional account company		C Elquidate account (in so many years)			8			
Other			Start year for X years		9			
Tax calculation option	Do not Tax (Roth) ~	Withdrawals	0		10			
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove		11 12			
Years deferred	0	Annual percentage withdrawal 0.0 %			13			
		Required minimum distribution (RMD)		Ö	14			
Asset plan allocation	Aggressive Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15			
Risk level	Aggressive	beneficial IKA RMD (based on beneficiaries life)			16 17			
Account owner			Reset all years	m.	18			
Account owner	~	Calculated Plan Withdrawals			19			
Account type	IRA 🗸	O Make-up total owners RMD from one account			20			
Add an income rider		 Make-up total benef RMD from one account 			21 22			
and the second	Client2 's age 🔘 Joint	 Make-up income gap based on target income 			23			
Select income rider	~			7	24			*
Number of months of payout in first ye	12.0							
Enter manual payout		Annual Savings						
Request Additional Rider Remove In	come Rider	Annual fixed savings						
			21 20122 21 20					
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	ues WILL NO	roll down to follo	wing years wh	ien blank

Step 12: Save: Click on the green Save button underneath the Manage Account Subheading.

				Y	OUR CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type			Inc	ome Data		
Initial account balance	\$1,000,000	Income Riders	ADD INCOME	Yea 1	r Income	V	ariable	*
Hypothetical return	6.0 %		Pick year(s)	2				
Bonus	0.0 %	Liquidate or annuitize	OR	4				
Or ional 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					
Ta calculation option	Do not Tax (Roth)	Withdrawals O Annual fixed withdrawal	0 Pick year(s) to remove					
Yeurs deferred	0	Annual percentage withdrawal 0.0 %		13				
Asset plan allocation	Aggressive Sel	Required minimum distribution (RMD)	Remove year to end of plan	15				
Ri: k level	Aggressive	 Beneficial IRA RMD (based on beneficiaries life) 		16 17				
Ac count owner	~	Calculated Plan Withdrawals	Reset all years	18				
Account type	IRA ~	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 O Joint			22				
Select income rider	~	 Make-up income gap based on target income 		20				-
Number of months of payout in first y	year 12.0			4				
Enter manual payout	Income Rider	Annual Savings Annual fixed savings						
Orange backgrounds indicate hy	ypothetical returns		Note that ente	red values	WILL NOT roll do	wn to followin	g years wh	en blank

Step 13: Manage: To make any editing changes to the account, click on the green manage button located in the income column of the account. This will take you back to the manage account page.

												YOUR CASE LIST SETTINGS
												PREPARED BY
				2							2	INITIAL PLAN DATE
CLIENT DASHBO	OARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS T	OOLS REVISED PLAN DATE
Structi	urod li	ncom	o Plar	nina								
Edit Save C	Cancel Add A	Account Add	d Income A	dd Inc Tax 🖌	Add Target	Edit or Add So	enario Disp	lay Options				
Scenario Crea	ating an IRA A	ccount from t	he SIP Page				\sim					
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			Acco	ounts	7							
	20 years 🗸	Sa	vinas		IRA		Ĩ	Inco	mes 7			
Horizon	_		ingo			Assault	Diseased	Inco		Tatal		
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
net return	50	0.01 %		6.00 %	IRA							
initial amount bonus %		29,000 0.00 %		1,000,000 0.00 %		1,029,000	Subtotal of account	Manage Infl Factor	Manage Infl Factor			
w/bonus		29,000	Manage	1,000,000	Manage	1,029,000	incomes	2.20 %	3.20 %			
end of 1	51	29,003	0	1,060,000	0	1,089,003	0	80,000	0	80,000	end of 1	
end of 2	52	29,006	0	1,123,600	0 🔺	1,152,606	0	81,760	0	81,760	end of 2	
end of 3	53	29,009	0	1,191,016	0	1,220,025	0	83,559	0	83,559	end of 3	
end of 4	54	29,012	0	1,262,477	0	1,291,488	0	85,397	0	85,397	end of 4	
end of 5	55 56	29,015	0	1,338,225	0	1,367,240	0	87,276	0	87,276	end of 5	
end of 6 end of 7	56	29,017 29,020	0	1,418,519 1,503,630	0	1,447,536 1,532,650	0	89,196 91,158	0	89,196 91,158	end of 6 end of 7	
end of 7 end of 8	58	29,020	0	1,503,830	0	1,622,871	0	91,156	0	93,164	end of 7 end of 8	
end of 9	59	29,026	0	1,689,478	ŏ	1,718,504	o o	95.213	0	95,213	end of 9	
end of 10	60	29,029	0	1,790,847	0	1,819,876	Ő	97,308	0	97,308	end of 10	
end of 11	61	29,032	0	1,898,298	0	1,927,330	0	99,449	0	99,449	end of 11	
end of 12	62	29,035	0	2,012,195	0	2,041,230	0	101,636	0	101,636	end of 12	
end of 13	63	29,038	0	2,132,927	0	2,161,965	0	103,872	0	103,872	end of 13	
end of 14	64	29,041	0	2,260,902	0	2,289,943	0	106,158	0	106,158	end of 14	
end of 15	65	29,044	0	2,396,556	0	2,425,600	0	0	32,661	32,661	end of 15	
end of 16	66	29,046	0	2,540,350	0	2,569,396	0	0	33,706	33,706	end of 16	
end of 17 end of 18	67 68	29,049 29,052	0	2,692,770 2,854,336	0	2,721,820 2,883,389	0	0	34,785 35,898	34,785 35,898	end of 17 end of 18	
end of 18 end of 19	69	29,052	0	2,854,336	0	2,883,389	0	0	35,898	35,898	end of 18 end of 19	
end of 20	70	29,055	0	3,207,132	• •	3,236,190	0	0	38,232	38,232	end of 20	
			0	.,	0		0		212,328	1,507,474		
			etical returns									

Step 14: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

												YOUR CASE LIST SETTINGS
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ENT DASHE	BOARD STR	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 DAT
truct	tured I	ncom	e Plar	nnina								
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nning	20 years ∨		10						, K			
izon		Sa	vings		IRA			Incor	nes /			
Yea		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
net re urn tial ar ioun	50	0.01 %		6.00 % 1,000,000	IRA	1,029,000	Subtotal	Manage	Manage			
bonu %		0.00 %		0.00 %		1,029,000	of account	Infl Factor	Infl Factor			
w/bo us		29,000	Manage	1,000,000	Manage	1,029,000	incomes	2.20 %	3.20 %			
end c 1	51	29,003	0	1,060,000	0	1,089,003	0	80,000	0	80,000	end of 1	
end c 2	52 53	29,006 29,009	0	1,123,600	0	1,152,606	0	81,760 83,559	0	81,760 83,559	end of 2 end of 3	
end c 3 end c 4	53	29,009	0	1,191,016 1,262,477	0	1,220,025 1,291,488	0	83,559 85,397	0	83,559 85,397	end of 3 end of 4	
end of 5	55	29,012	0	1,338,225	0	1,367,240	0	87,276	0	87,276	end of 4 end of 5	
end c 6	56	29,010	0	1,418,519	0	1,447,536	0	89,196	0	89,196	end of 6	
end c 7	57	29,020	Ő	1,503,630	0	1,532,650	0	91,158	0	91,158	end of 7	
end 🗗 8	58	29,023	0	1,593,848	0	1,622,871	0	93,164	0	93,164	end of 8	
end ef 9	59	29,026	0	1,689,478	0	1,718,504	0	95,213	0	95,213	end of 9	
end o 10	60	29,029	0	1,790,847	0	1,819,876	0	97,308	0	97,308	end of 10	
end o 11 end o 12	61 62	29,032 29,035	0	1,898,298 2,012,195	0	1,927,330 2,041,230	0	99,449 101,636	0	99,449	end of 11 end of 12	
end of 13	63	29,035	0	2,012,195	0	2,041,230	0	101,636	0	101,636 103,872	end of 12 end of 13	
end of 14	64	29,030	0	2,260,902	0	2,289,943	0	106,158	0	106,158	end of 14	
end of 15	65	29,044	0	2,396,556	0	2,425,600	0	0	32,661	32,661	end of 15	
end of 16	66	29,046	0	2,540,350	0	2,569,396	0	0	33,706	33,706	end of 16	
end of 17	67	29,049	0	2,692,770	0	2,721,820	0	0	34,785	34,785	end of 17	
end of 18	68	29,052	0	2,854,336	0	2,883,389	0	0	35,898	35,898	end of 18	
end of 19	69	29,055	0	3,025,596	0	3,054,652	0	0	37,047	37,047	end of 19	
end of 20	70	29,058	0	3,207,132	0	3,236,190	0	1,295,145	38,232 212,328	38,232 1,507,474	end of 20	

Step 15: 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.

													PREPARED B
													INITIAL PLAN DATE
NT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FLO	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS T	OOLS	REVISED PLAN DATE
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Crea	ting an IRA A	ccount from t	ne SIP Page				~						
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zon	20 years ∨	Sa	vings	1	RA			Inco	mes 🔊				
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year		
et return	50	0.01 %		6.00 %	IRA			Huges		moonie			
ial amount bonus %		29,000 0.00 %		1,000,000		1,029,000	Subtotal of account	Infl Factor	Infl Factor				
v/bonus		29,000		1,000,000		1,029,000	incomes	2.20 %	3.20 %				
end of 1	51	29,003	0	1,060,000	0	1,089,003	0	80,000	0	80,000	end of 1		
end of 2	52	29,006	0	1,123,600	0	1,152,606	0	81,760	0	81,760	end of 2		
end of 3	53 54	29,009	0	1,191,016	0	1,220,025	0	83,559	0	83,559	end of 3		
end of 4 end of 5	54	29,012 29,015	0	1,262,477 1,338,225	0	1,291,488 1,367,240	0	85,397 87,276	0	85,397 87,276	end of 4 end of 5		
end of 6	56	29,013	0	1,418,519	0	1,447,536	0	89,196	0	89,196	end of 6		
end of 7	57	29,020	0	1,503,630	0	1,532,650	0	91,158	0	91,158	end of 7		
end of 8	58	29,023	0	1,593,848	0	1,622,871	0	93,164	0	93,164	end of 8		
end of 9	59	29,026	0	1,689,478	0	1,718,504	0	95,213	0	95,213	end of 9		
end of 10	60	29,029	0	1,790,847	0	1,819,876	0	97,308	0	97,308	end of 10		
end of 11 end of 12	61 62	29,032 29,035	0	1,898,298 2,012,195	0	1,927,330 2,041,230	0	99,449 101,636	0	99,449 101,636	end of 11 end of 12		
end of 12 end of 13	63	29,035	0	2,012,195	0	2,041,230	0	101,636	0	101,636	end of 12 end of 13		
end of 14	64	29,030	0	2,260,902	0	2,289,943	0	106,158	0	106,158	end of 14		
and of 15	65	29,044	0	2,396,556	0	2,425,600	Ő	0	32,661	32,661	end of 15		
end of 16	66	29,046	0	2,540,350	0	2,569,396	0	0	33,706	33,706	end of 16		
end of 17	67	29,049	0	2,692,770	0	2,721,820	0	0	34,785	34,785	end of 17		
end of 18	68	29,052	0	2,854,336	0	2,883,389	0	0	35,898	35,898	end of 18		
end of 19	69	29,055	0	3,025,596	0	3,054,652	0	0	37,047	37,047	end of 19		
end of 20	70	29,058	0	3,207,132	0	3,236,190	0	0	38,232	38,232	end of 20		
			0		0		0	1,295,145	212,328	1,507,474			

Step 16: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

CLEENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS REVISED PLAN DATE Structured Income Planning Add Account Add Income Inc														YOUR CAS	SE LIST SETTINGS	HELP
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Orange backgrounds indicate hypothetical returns				•		U		0	1,290,145	212,328	1,007,474					

Step 17: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

												YOUR CASE LIST SETTINGS HELP
												PREPARED BY:
				2								INITIAL PLAN DATE:
CLIENT DASHBO	ARD STRU	JCTURED INCOM	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS	OLS REVISED PLAN DATE:
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Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
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end of 1	51	29,003	0	1,060,000	0	1,089,003	0	80,000	0.20 0	80,000	end of 1	
end of 2	52	29,006	0	1,123,600	0	1,152,606	0	81,760	0	81,760	end of 2	
end of 3	53	29,009	0	1,191,016	0	1,220,025	0	83,559	0	83,559	end of 3	
end of 4	54	29,012	0	1,262,477	0	1,291,488	0	85,397	0	85,397	end of 4	
end of 5 end of 6	55 56	29,015 29,017	0	1,338,225	0	1,367,240 1,447,536	0	87,276 89,196	0	87,276 89,196	end of 5 end of 6	
end of 6 end of 7	50	29,017	0	1,418,519	0	1,447,536	0	91,158	0	91,158	end of 6 end of 7	
end of 8	58	29,023	0	1,593,848	0	1,622,871	0	93,164	0	93,164	end of 8	
end of 9	59	29,026	0	1,689,478	0	1,718,504	0	95,213	0	95,213	end of 9	
end of 10	60	29,029	0	1,790,847	0	1,819,876	0	97,308	0	97,308	end of 10	
end of 11	61	29,032	0	1,898,298	0	1,927,330	0	99,449	0	99,449	end of 11	
end of 12	62	29,035	0	2,012,195	0	2,041,230	0	101,636	0	101,636	end of 12	
end of 13 end of 14	63 64	29,038 29,041	0	2,132,927 2,260,902	0	2,161,965 2,289,943	0	103,872 106,158	0	103,872 106,158	end of 13 end of 14	
end of 14 end of 15	65	29,041	0	2,200,902		2,289,943		00,150	32,661	32,661	end of 15	
end of 16	66	29,046	0	2,540,350	0	2,569,396	0	0	33,706	33,706	end of 16	
end of 17	67	29,049	0	2,692,770	0	2,721,820	0	0	34,785	34,785	end of 17	
end of 18	68	29,052	0	2,854,336	0	2,883,389	0	0	35,898	35,898	end of 18	
end of 19	69	29,055	0	3,025,596	0	3,054,652	0	0	37,047	37,047	end of 19	
end of 20	70	29,058	0	3,207,132	0	3,236,190	0	0	38,232	38,232	end of 20	
-			-		0		0	1,295,145	212,328	1,507,474		
Orange ba	ckgrounds ind	dicate hypothe	etical returns	5								

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