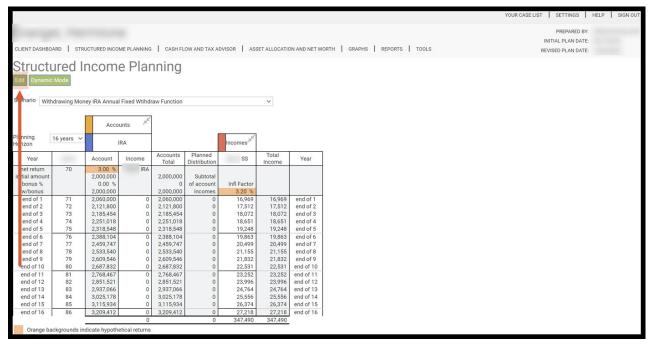
# Withdrawing from an IRA Account Using the Annual Withdrawal Function

11/08/2024 1:15 pm EST

From the structured income planning page there are different ways you can withdraw money from an IRA account. Below is a step-by-step guideline for withdrawing money using the annual 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 IRA account.

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Ianning Orizon         Is years         Account         Inc         me         Account Distribution         Incomes           Net return intitial amount bonus%         70         Account         Inc         Ma         Account         Inc         Mass         Incomes           end of 1         71         2,000,000         Inc         RA         2,000,000         Income         Mass         Incomes           end of 1         71         2,000,000         Inc         RA         2,000,000         Incomes         S2.0 %         Incomes         Incomes           end of 1         71         2,000,000         Incerease         2,000,000         Incomes         S2.0 %         Incomes         Incomes           end of 2         72         2,121,800         0         1,7,512         end of 2         end of 2         end of 3         73         2,185,454         0         1,8,651         end of 3         end of 4         end of 5         75         2,318,548         0         1,9,248         19,248         end of 6         red 4         77         2,499,747         0         2,499,947         0         2,32,52         end of 1           end of 7         2,499,747         0         2,38,164         0         2,32,5	ave Cancer Add	Account	IIICO IE A		Aud Targer	Luit of Add Scen	lano Dispia	yopuons				
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Ianning OriZon         Is years         V         Ist		Account	nte 📈									
Increase         Increase           Vear         Account         Inc         Planed         Income s <sup>n</sup> Year           met return Intial amounts         70         3.00 %         Inc         RA         Status         Inc         N         Status         Year           met return bonus%         70         2.00,000         Int         N         Status         Inc         Year           end of 1         71         2.00,000         Subtoal         Inf Factor         Year         Inf Factor         Year           end of 1         71         2.00,000         Subtoal         Inf Factor         Year         Year           end of 2         72         2.18,454         0         2.10,100         0         17,512         end of 2           end of 4         74         2.251,018         0         2.318,484         0         19,248         end of 5           end of 5         75         2.318,414         0         2.318,414         0         19,248         end of 7           end of 7         77         2.459,747         0         2.609,700         2.18,322         end of 1           end of 1         78         2.583,540         0         2.338,144		Accou	11.5			_						
Vision         Account         Plannet Distribution         Total Distribution         Total Distribution         Vear           net return bonus % w/bonus         70         2.000.00 0.00 %         IRA 2.000.00         2.000.00 0         Memory of account         Memory Inflace         Year           end of 1         71         2.000.000         IRA 2.000.000         2.000.000         Memory of account         Infl Factor Infl Factor         Infl Factor           end of 1         71         2.005.000         0         2.165.050         0         17.512         end of 2.           end of 3         73         2.185.454         0         18,651         end of 3.         end of 4.           end of 5         75         2.318.548         0         2.251.018         0         19,863         19,663         end of 5.           end of 7         2.459.747         0         2.489.747         0         2.499.947         0         2.499.947           end of 1         79         2.695.546         0         2.325.23         end of 1.         end of 1.           end of 1         88         2.697.542         0         2.325.23         end of 11.         end of 1.           end of 12         82         2.867.822         0						Incomes						
Vera         Account         Incime         Total         Distribution         SS         Income         Year           met returm initial amount bonus%         70         3.00 %         IRA         2.000.00         Subtotal         Manage	rizon		~			incomes						
net return Initial amount, borus %         70         30.0 %         IRA 2.000.000         Subtolal 0         Manace incomes         Subtolal 320 %           w/bonus %         2.000.000         Manace         2.000.000         Subtolal 0         Subtolal of account         Infl Factor incomes         320 %           end of 1         71         2.060.000         0         16.660         16.969         end of 1           end of 2         72         2.121.800         0         2.121.800         0         17.512         end of 2           end of 4         74         2.251.018         0         2.388.104         0         19.248         end of 5           end of 6         76         2.388.104         0         2.388.104         0         2.18.543         0         19.248         end of 5           end of 6         76         2.388.104         0         2.18.543         0         2.18.543         end of 7           end of 7         7         2.489.747         0         2.04.99         end of 7           end of 7         78         2.533.540         0         2.18.32         end of 10           80         2.699.546         0         2.392.56         2.23.99.6         end of 10	Year	Account	Income			SS		Year				
Initial arount borus % w/borus         2.000.000 2.000,000         Manage 0         Subtrail of account income         Manage 320 %           end of 1         71         2.050,000         0         16,669         16,969         end of 1           end of 1         72         2.121,800         0         2.020,000         17,512         end of 2           end of 3         73         2.158,454         0         2.121,800         0         17,512         end of 2           end of 4         74         2.251,018         0         2.251,018         0         18,651         end of 4           end of 5         75         2.318,548         0         2.318,548         0         19,963         end of 5           end of 7         77         2.459,747         0         2.459,747         0         2.459,747         0         2.459,747           end of 7         77         2.459,747         0         2.459,747         0         2.18,32         end of 7           end of 7         77         2.459,747         0         2.245,93         end of 7         end of 7           end of 10         80         2.695,846         0         2.18,32         end of 11           end of 12         2.28,15	net return 70	3.00 %	IRA	Total	Distribution		Income	19730				
bonus%         velocut         0.00 %         of account         Inff Factor           widonus         2.000.000         income         3.20.8         velocut         income         3.20.8           end of 1         71         2.060.000         0         2.000.000         16,690         16,690         end of 1           end of 2         72         2.121.800         0         2.121,800         0         17,512         end of 2           end of 3         73         2.185.454         0         2.185,454         0         18,672         end of 3           end of 4         74         2.251,018         0         2.318,548         0         19,248         end of 4           end of 5         75         2.318,548         0         2.388,104         0         19,863         19,863         end of 7           end of 6         76         2.338,104         0         2.1832         end of 7         end of 7           end of 7         2.459,747         0         2.409,947         0         2.1492         end of 1           end of 9         2.609,546         0         2.1832         end of 1         end of 1           end of 10         80         2.697,842         0 </td <td></td> <td></td> <td></td> <td>2 000 000</td> <td>Subtotal</td> <td>Manage</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>				2 000 000	Subtotal	Manage						
wboms         form         2000,000         Manspace         2000,000         Manspace         3 200,000         incomes         3 20         Model           end of 1         71         2,060,000         0         2,060,000         0         16,969         end of 2           end of 2         72         2,121,800         0         2,121,800         0         17,512         end of 2           end of 3         73         2,155,454         0         2,121,800         18,072         18,072         end of 3           end of 4         2,121,800         0         2,251,018         0         18,051         end of 4           end of 5         75         2,318,548         0         2,318,548         0         19,268         end of 5           end of 7         77         2,459,747         0         2,349,747         0         20,499         end of 7           end of 8         78         2,533,540         0         2,133,2         18,362         end of 1           end of 1         80         2,609,546         0         2,269,39         2,24,392         end of 1           end of 10         80         2,609,546         0         2,609,546         0         2,3252			•									
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end of 4       74       2,251,018       0       2,251,018       0       18,651       16,651       end of 4         end of 5       2,318,548       0       2,318,548       0       19,248       end of 5         end of 6       75       2,318,548       0       2,318,548       0       19,248       end of 5         end of 7       77       2,459,747       0       2,389,104       0       19,863       end of 6         end of 7       77       2,459,747       0       2,338,104       0       21,155       end of 7         end of 8       78       2,533,540       0       2,11,55       end of 7       end of 7         end of 9       79       2,609,546       0       2,838,20       0       2,21,832       end of 1         end of 1       81       2,768,467       0       2,3252       end of 11         end of 12       82       2,851,521       0       2,3252       end of 12         end of 13       83       2,397,066       0       2,3254       end of 13         end of 14       84       3,025,178       0       3,025,178       0       2,5556       end of 14         end of 15       85       3,			0		0			end of 3				
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end of 7     77     2,459,747     0     2,459,747     0     20,499     end of 7       end of 8     2,533,540     0     2,533,540     0     2,1155     end of 8       end of 9     79     2,609,546     0     2,609,546     0     2,1155     end of 9       end of 10     80     2,669,546     0     2,609,546     0     2,1832     end of 10       end of 11     81     2,768,467     0     2,23,52     end of 11       end of 12     82     2,851,521     0     2,23,52     end of 12       end of 13     83     2,937,066     0     2,32,562     end of 13       end of 14     84     3,025,178     0     3,025,178     0     2,25,556     end of 13       end of 14     84     3,025,178     0     3,05,178     0     2,63,74     2,63,74       end of 15     85     3,115,934     0     3,15,934     0     2,63,74     2,63,74       end of 16     86     3,029,412     0     3,27,12     0     2,72,118     end of 16												
end of 8     78     2,533,540     0     2,333,540     0     2,11,55     end of 8       end of 9     2,609,546     0     2,639,546     0     2,18,32     end of 9       end of 10     80     2,687,832     0     2,283,540     0     2,28,31       end of 10     80     2,687,832     0     2,23,252     22,531     end of 10       end of 11     81     2,768,467     0     2,32,52     23,252     end of 12       end of 12     2,281,521     0     2,33,96     end of 12       end of 13     83     2,937,066     0     2,47,64     24,764       end of 14     84     3,025,178     0     3,255,776     0       end of 15     85     3,115,934     0     2,63,74     2,63,74       end of 16     86     3,094,12     0     2,72,118     end of 16												
end of 9     79     2.609 546     0     2.609 546     0     2.1832     2.1832     end of 9       end of 10     80     2.687 832     0     2.687 832     0     2.2531     end of 10       end of 11     11     2.768 467     0     2.3252     end of 11       end of 12     82     2.851 521     0     2.3252     end of 12       end of 13     33     2.937066     0     2.4764     end of 13       end of 14     84     3.025,178     0     2.2555     2.5556     end of 14       end of 15     85     3.115,934     0     3.025,178     0     2.6374     2.6,374       end of 15     86     3.029,412     0     2.272,118     end of 16												
end of 10         80         2.687,832         0         2.687,832         0         2.28,31         2.28,31         end of 10           end of 11         81         2.768,467         0         2.26,81         2.28,31         2.28,31         end of 10           end of 12         82         2.851,521         0         2.32,52         2.3,52         end of 12           end of 12         82         2.851,521         0         2.39,56         end of 12           end of 13         83         2.937,066         0         2.93,706         0         2.47,64         2.4,764         end of 13           end of 14         3.025,178         0         3.025,178         0         2.55,56         end of 14           end of 15         85         3.15,934         0         3.15,934         0         2.6,374         2.6,374         end of 16           end of 15         86         3.20,9412         0         2.27,218         end of 16         end of 16												
end of 11         81         2,768,467         0         2,768,467         0         23,252         23,252         end of 11           end of 12         82         2,851,521         0         2,851,521         0         23,996         23,996         end of 12         83         2,937,066         0         24,764         end of 13           end of 13         83         2,937,066         0         24,764         end of 13         end of 13           end of 14         84         3,025,178         0         3,255,555         25,556         end of 14           end of 15         85         3,115,934         0         3,115,934         0         2,6374         end of 15           end of 16         86         3,209,412         0         2,72,118         end of 16			-									
end of 12     82     2.851,521     0     2.851,521     0     2.3996     end of 12       end of 13     83     2.937,066     0     2.47,64     end of 12       end of 14     84     3.025,178     0     2.47,64     end of 14       end of 15     85     3.115,934     0     3.15,934     0     2.5556     e1d of 14       end of 16     86     3.029,172     0     3.025,178     0     2.63,74     end of 15       end of 16     86     3.09,412     0     3.27,218     0     2.72,118     end of 16												
end of 13         83         2,937,066         0         2,937,066         0         2,4764         end of 13           end of 14         84         3,025,178         0         3,025,178         0         22,5556         25,556         end of 14           end of 15         85         3,115,934         0         3,115,934         0         26,374         end of 15           end of 16         86         3,209,412         0         3,209,412         0         27,218         27,218         end of 16												
end of 14         84         3.025,178         0         3.025,178         0         2.5556         2.5556         end of 14           end of 15         85         3.115,934         0         3.115,934         0         2.6,374         end of 15           86         3.209,412         0         3.209,412         0         2.72,118         end of 16												
end of 15         85         3,115,934         0         3,115,934         0         26,374         26,374         end of 15           end of 16         86         3,209,412         0         3,209,412         0         27,218         end of 16												
end of 16 86 3,209,412 0 3,209,412 0 27,218 27,218 end of 16												
			-		-							
	00 01 10 1 00	0,209,412		0,209,412				CH0 01 10				

#### Option A: Pick Years:

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

				Y	OUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Accour	ht.						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Inco	me Data	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Yea	Income	Variable	-
Hypothetical return	3.0 %	<ul> <li>Start payout from income rider</li> </ul>	Distance	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		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR	7			
Other			Start year for X years				
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
	Tax Income Distributions (Qualified)	Annual fixed withdrawal	Pick year(s) to remove	11			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal     0.0 %	Pick year(s) to remove	12			
		Required minimum distribution (RMD)		14			
Asset plan allocation	Moderate Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	15			
Risk level	Moderate	beneficial not himb (based on beneficialies ine)		16 17			
Account owner	~		Reset all years	18			
Assessment from a		Calculated Plan Withdrawals		19 20			
Account type Add an income rider	IRA ~	O Make-up total owners RMD from one account		21			
27 of 19568	Client2 's age 🔘 Joint	Make-up total benef RMD from one account		22			
Select income rider	×	<ul> <li>Make-up income gap based on target income</li> </ul>		23			-
Number of months of payout in first y	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	WILL NOT roll dov	vn to following years w	/hen blank

Step 4: Annual Fixed Withdrawal Text Box: Enter in the monetary amount as a number. SIPS does not recognize the dollar sign; it only accepts number with or without commas. For example: 5,000;5000;-5,000; or -5000.

				YOU	R CASE LIST SETTING	SS HELP	SIGN OUT
Manage Account							
Save Cancel View / Edit Income View / Edit De	ath Benefit View / Edit Actual Values						
Account name IRA		Structured Income Type			Income Data		
Initial account balance \$2,000,00	0	Income Riders	ADD INCOME	Year	Income	Variable	
TS SERVICE TO SERVICE		<ul> <li>Start payout from income rider</li> </ul>					
Hypothetical return 3.	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		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR				
Optional account company				8			
Other			Start year for X years	9			
Tax calculation option Tax Income	Distributions (Qualified)	Withdrawals	0	10			
Add money later - deferred account		<ul> <li>Annual fixed withdrawal</li> </ul>	Pick year(s) to remove	12			
Years deferred 0		Annual percentage withdrawal     0.0 %	6 () (SDP	13			
Asset plan allocation Moderate	_	O Required minimum distribution (RMD)		14			
Asset plan allocation Moderate	Sel	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>	Remove year to end of plan	15			
Risk level Moderate				17			
Account owner	~		Reset all years	18			
		Calculated Plan Withdrawals		19 20			
Account type IRA Add an income rider	~	<ul> <li>Make-up total owners RMD from one account</li> </ul>		20			
Based on  age  Client2 's age	O Joint	<ul> <li>Make-up total benef RMD from one account</li> </ul>		22			
Select income rider	V	O Make-up income gap based on target income		23			-
Number of months of payout in first year	12.0			₹ 24			>
Enter manual payout	t da - M						
		Annual Savings					
Request Additional Rider Remove Income Rider		0					
Orange backgrounds indicate hypothetical return	rns		Note that ente	red values WI	LL NOT roll down to follo	wing years wh	nen blank

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

					YOU	JR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accoun	)t							
	View / Edit Death Benefit View / Edit Actual Values							
				1				
Account name	IRA	Structured Income Type		ł		Income D	lata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	ŕ	Year	Income	Variable	*
		<ul> <li>Start payout from income rider</li> </ul>	-		1			
Hypothetical return	3.0 %		Pick year(s)		2			
Bonus	0.0 %	18 m 18	OR		4			
Ontional		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	Ö	5			
Optional Account description			OR		6			
Optional account company		<ul> <li>Liquidate account (in so many years)</li> </ul>			7			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10			
	Tax income Distributions (Qualified)	Annual fixed withdrawal 60,000			11			
Add money later - deferred account		Annual percentage withdrawal 0.0 %	Pick year(s) to remove		12 13			
Years deferred	0				14			
Asset plan allocation	Moderate Sel	<ul> <li>Required minimum distribution (RMD)</li> </ul>	Remove year to end of plan		15			
Risk level		<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>		Ö	16			
RISKIEVEI	Moderate		an and a state of the		17			
Account owner	~	Calculated Plan Withdrawals	Reset all years		18 19			
Account type	IRA V	<ul> <li>Make-up total owners RMD from one account</li> </ul>			20			
Add an income rider					21			
Based on 🔘 age 🔿 C	Client2 's age 🔘 Joint				22			
Select income rider	~	<ul> <li>Make-up income gap based on target income</li> </ul>			23 24			-
Number of months of payout in first ye	ar 12.0			4				•
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	come Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that enter	red va	lues W	ILL NOT roll down to	following years	when blank

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

					YOUR C/	ASE LIST   SET	TINGS   HELP	SIGN OUT
Manage Accour	nt							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	3.0 %		Pick year(s)		2			
Bonus	0.0 %	-	OR		3			
Optional		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Account description			OR		6			
Optional account company		<ul> <li>Liquidate account (in so many years)</li> </ul>			7			
Other			Start year for X years		9			
			0		10			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals  Annual fixed withdrawal  60,000			11			
Add money later - deferred account		-	Pick year(s) to remove		12			
Years deferred	0	Annual percentage withdrawal     0.0 %			13			
		<ul> <li>Required minimum distribution (RMD)</li> </ul>			14			
Asset plan allocation	Moderate Sel	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>	Remove year to end of plan		15			
Risk level	Moderate	beneficial IKA RMD (based on beneficialies life)			16 17			
			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals	(toottan) onlo		19			
Account type	IRA ~	O Make-up total owners RMD from one account			20			
Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>			21			
Based on 💿 age 🔿 🛛	Client2 's age 🔘 Joint				22			
Select income rider	~	<ul> <li>Make-up income gap based on target income</li> </ul>			23 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 hyp	pothetical returns		Note that enter	red va	lues WILL N	NOT roll down to t	ollowing years w	hen blank

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

					YOUR C/	ASE LIST SETT	TINGS HELP	SIGN OUT
Manage Accoun	1 <sup>†</sup>						1	
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Other strengtheness Trans				Income Da	ata	
Initial account balance		Structured Income Type	ADD INCOME		Year	Income	Variable	
	\$2,000,000	<ul> <li>Start payout from income rider</li> </ul>			1	fixed	60,000	
Hypothetical return	3.0 %		Pick year(s)		2	fixed	60,000 60,000	
Bonus	0.0 %		OR		4	fixed	60,000	
Orthout		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	ŏ	5	fixed	60,000	
Optional Account description			OR		6	fixed	60,000	
Optional account company		<ul> <li>Liquidate account (in so many years)</li> </ul>			7	fixed fixed	60,000 60,000	
Other			Start year for X years		9	fixed	60,000	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	0	10	fixed	60,000	
		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			
reals defened	0				14			
Asset plan allocation	Moderate Sel		Remove year to end of plan		15			
Risk level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>			16 17			
			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals	Neset un yeurs		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			
Based on 🔘 age 🔾 C	Client2 's age 🔘 Joint	<ul> <li>Make-up income gap based on target income</li> </ul>			22			
Select income rider	~	Make-up income gap based on target income		2	24			-
Number of months of payout in first ye	12.0			<u>_q</u>				,
Enter manual payout		Annual Savings						
		Annual fixed savings						
	come Rider							
Orange backgrounds indicate hyp	oothetical returns		Note that enter	red va	ues WILL N	NOT roll down to f	ollowing years w	hen blank

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

					YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Manage Account							
	/ Edit Death Benefit View / Edit Actual Values						
Account name IRA		Structured Income Type			Inco	ome Data	
Ini al account balance \$2	2,000,000	Income Riders	ADD INCOME		'ear Income 1 fixed	Variable 60,000	*
Hypothetical return	3.0 %	<ul> <li>Start payout from income rider</li> </ul>	Pick year(s)		2 fixed	60,000	
			OR		3 fixed	60,000	
Bohus	0.0 %	Liquidate or annuitize			4 fixed 5 fixed	60,000 60,000	
Op ional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		6 fixed	60,000	
Account description		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR		7 fixed	60,000	
Optional account company				ŏ	8 fixed	60,000	
Dther			Start year for X years		9 fixed	60,000	
Ta calculation option Tax I	Income Distributions (Qualified)	Withdrawals	0	0	10 fixed	60,000	
Act money later - deferred account		<ul> <li>Annual fixed withdrawal</li> </ul>	Pick year(s) to remove	U .	12		
Acd money later - deferred account		Annual percentage withdrawal     0.0 %			13		
	5	Required minimum distribution (RMD)		Ö	14		
Asset plan allocation Mode	erate Sel		Remove year to end of plan	Ō	15		
Risk level Mode	erate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>		<u> </u>	16		
Wode	erate		Develop		17 18		
Account owner	~	Calculated Plan Withdrawals	Reset all years		19		
Account type	~	Make-up total owners RMD from one account			20		
Add an income rider				ŏ	21		
Based on 💿 age 🔿 Client2		<ul> <li>Make-up total benef RMD from one account</li> </ul>			22		
Select income rider	~	O Make-up income gap based on target income		0	23		-
Number of months of payout in first year	12.0			-	74		
Enter manual payout							
		Annual Savings					
Request Additional Rider Remove Income	Rider						
Orange backgrounds indicate hypothetic	ical returns		Note that enter	ed valu	es WILL NOT roll dov	vn to following years	when blank

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

																		YOUR CA	SE LIST	SETT	INGS	HELP	SIG	N C
																				PREF	PARED BY:			
																			IN	ITIAL PL	AN DATE:			
CLIENT DASHBO	DARD STR	UCTURED INCO	E PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	SET ALLOCATIO	ON AND NET W	T WOR	RTH	(T	GRA	PHS	REPO	ORTS	TOOLS					AN DATE:			
Struct	ured I	ncom	Plar	nnina																				
					Add Target	Edit or Add Scen	ario Displa	y Options	1															
Care ouve e					Nuo rarger		lano Dispic	y options																
Scenario Wit	hdrawing Mon	ey IRA Annua	Fixed Wtihdr	raw Function			~																	
			•																					
		Acco	ounts 🔊																					
Planning Horizon	16 years 🗸		IRA			Incomes																		
				Accounts	Planned		Total																	
Year		Account	Income	Total	Distribution	SS	Income	Year																
net return	70	3.00 %	IRA																					
initial amount		2,000,000		2,000,000	Subtotal	Manage																		
bonus %		0.00 %		0	of account	Infl Factor																		
w/bonus	7.	2,000,000	Manage	2,000,000	incomes	3.20 %	76,969	end of 1	_															
end of 1 end of 2	71 72	2,000,000 2,000,000	60,000 60,000	2,000,000	60,000 60,000	16,969 17,512	76,969	end of 1 end of 2																
end of 3	73	2,000,000	60,000	2,000,000	60,000	18,072	78,072	end of 3																
end of 4	74	2,000,000	60,000	2,000,000	60,000	18,651	78,651	end of 4																
end of 5	75	2,000,000	60,000	2,000,000	60,000	19,248	79,248	end of 5																
end of 6	76	2,000,000	60,000	2,000,000	60,000	19,863	79,863	end of 6																
end of 7	77	2,000,000	60,000	2,000,000	60,000	20,499	80,499	end of 7																
end of 8	78	2,000,000	60,000	2,000,000	60,000	21,155	81,155	end of 8																
end of 9	79	2,000,000	60,000	2,000,000	60,000	21,832	81,832	end of 9																
end of 10	80	2,000,000	60,000	2,000,000	60,000	22,531	82,531	end of 10																
end of 11	81	2,060,000	0	2,060,000	0	23,252	23,252	end of 11	1															
end of 12	82	2,121,800	0	2,121,800	0	23,996	23,996	end of 12	2															
end of 13	83	2,185,454	0	2,185,454	0	24,764	24,764	end of 13	3															
end of 14	84	2,251,018	0	2,251,018	0	25,556	25,556	end of 14																
end of 15	85	2,318,548	0	2,318,548	0	26,374	26,374	end of 15																
end of 16	86	2,388,104	0	2,388,104	0	27,218	27,218	end of 16	6															
			600,000		600,000	347,490	947,490																	
Orange ba	ackgrounds in	dicate hypoth	etical returns																					
	-																							r

Option B: Start Years for Rest of Plan: Step 10: Structured Income Type: Click on the radio button next to Annual Fixed Withdrawal.

					YOUR CASI	ELIST 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	\$2,000,000	Income Riders	ADD INCOME		Year 1	Income	Variable	
Hypothetical return	3.0 %	<ul> <li>Start payout from income rider</li> </ul>	Pick year(s)		2			
			OR		3			
Bonus	0.0 %	Liquidate or annuitize			4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan OR		6			
Account description Optional account company		O Liquidate account (in so many years)	UK		7			
Other			Start year for X years		8			
Tax calculation option	Turkey Disking (Our life a)	Withdrawals	0		10			
	Tax Income Distributions (Qualified)	Annual fixed withdrawal			11			
Add money later - deferred account		Annual percentage withdrawal     0.0 %	Pick year(s) to remove		12			
Years deferred	0				14			
Asset plan allocation	Moderate Sel	Required minimum distribution (RMD)	Remove year to end of plan		15			
Risk level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>			16			
			Reset all years		17			
Account owner	~	Calculated Plan Withdrawals	Neoci un yeuro		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			
Based on 💿 age 🔾 (	Client2 's age O Joint	Make-up income gap based on target income			23			
Select income rider	~	O make up income gap based on taiget income		ŝ	24			· •
Number of months of payout in first ye	ear 12.0			4				,
Enter manual payout		Annual Savings						
Request Additional Rider Remove Ir	ncome Rider	Annual fixed savings						
				7.17		-		
Orange backgrounds indicate hyperic of the second s	potnetical returns		Note that ente	red valu	ues WILL NO	T roll down to follo	wing years wh	ien blank

Step 11: Annual Fixed Withdrawal Text Box: Enter in the monetary amount as a number. SIPS does not recognize the dollar sign; it only accepts number with or without commas. For example: 5,000;5000;-5,000; or -5000.

				YOU	JR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accour	t.						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income D	ata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Year	Income	Variable	*
Hypothetical return		<ul> <li>Start payout from income rider</li> </ul>					
Hypothetical return	3.0 %		Pick year(s)	3			
Bonus	0.0 %	Liquidate or annuitize	on a	4			
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description		O Liquidate account (in so many years)	OR	0 7			
Optional account company Other			Start year for X years	8			
				9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals  Annual fixed withdrawal		11		_	
Add money later - deferred account			Pick year(s) to remove	12		-	
Years deferred	0	Annual percentage withdrawal     0.0 %		13			
Asset plan allocation	Moderate Sel	<ul> <li>Required minimum distribution (RMD)</li> </ul>	Remove year to end of plan	15			
Risk level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>		16			
	Moderate		Reset all years	17			
Account owner	<b>`</b>	Calculated Plan Withdrawals	Reset all years	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			
and the second se	Client2 's age O Joint	<ul> <li>Make-up income gap based on target income</li> </ul>		23			
Select income rider	~	0		~ 24			*
Number of months of payout in first ye Enter manual payout	ear 12.0						
		Annual Savings					
Request Additional Rider Remove In	ncome Rider	Annual fixed savings					
Orange backgrounds indicate hyp			Note that ente	red values W	ILL NOT roll down to	ollowing 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.

					YOU	IR CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour	at								
	View / Edit Death Benefit View / Edit Actual Values								
ource ouncer view / Ear meane	Them / Luit Death Deficite Them / Luit Actual Values			1					
Account name	IRA	Structured Income Type		ŧ		Inco	ome Data		~
Initial account balance	\$2,000,000	Income Riders  Start payout from income rider	ADD INCOME		Year 1	Income		Variable	*
Hypothetical return	3.0 %		Pick year(s)		2				
Bonus	0.0 %	Liquidate or annuitize	OR	0	4				
Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		5 6				
Account description Optional account company Other		O Liquidate account (in so many years)	OR Start year for X years	0000	7 8 9				
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals Annual fixed withdrawal 75,000	0		10 11				
Add money later - deferred account		Annual percentage withdrawal     0.0 %	Pick year(s) to remove		12 13				
Years deferred	0	Required minimum distribution (RMD)			14				
Asset plan allocation	Moderate Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan		15				
Risk level	Moderate	Beneficial IRA RMD (based on beneficianes life)			16 17				
Account owner	~		Reset all years	Ö	18				
Account type	IRA Y	Calculated Plan Withdrawals Make-up total owners RMD from one account			19 20				
Add an income rider	IDA V			0	21				
Based on 💿 age 🔾	Client2 's age 🔘 Joint	Make-up total benef RMD from one account			22 23				
Select income rider	~	O Make-up income gap based on target income		0	24				*
Number of months of payout in first ye	ear 12.0			- <b>4</b>					P
Enter manual payout		Annual Savings							
Request Additional Rider Remove In	ncome Rider	Annual fixed savings							
Orange backgrounds indicate hy	pothetical returns		Note that enter	red va	alues WI	LL NOT roll dov	vn to followi	ing years wh	en blank

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

					YOUR	CASE LIST SETT	TINGS HELP	SIGN OUT
Manage Accour	1 <sup>†</sup>							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income	Variable	*
Hypothetical return	3.0 %		Pick year(s)		2			
Bonus	0.0 %	Liquidate or annuitize	OR		4			
Optional			Start year for rest of plan		5			
Account description		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR		7			
Optional account company			0		8			
Other			Start year for X years		9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10			
	Tax moome Distributions (Qualified)	Annual fixed withdrawal 75,000			11			
Add money later - deferred account		Annual percentage withdrawal     0.0 %	Pick year(s) to remove		12			
Years deferred	0				13 14			
Asset plan allocation	Moderate Sel	<ul> <li>Required minimum distribution (RMD)</li> </ul>	Remove year to end of plan		15			
		<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>	nemore year to end or plan		16			
Risk level	Moderate				17			
Account owner	~		Reset all years		18			
A		Calculated Plan Withdrawals			19 20			
Account type Add an income rider	IRA V	O Make-up total owners RMD from one account			21			
		<ul> <li>Make-up total benef RMD from one account</li> </ul>			22			
	Client2 's age O Joint	O Make-up income gap based on target income			23			
Select income rider	~	0		7	24			*
Number of months of payout in first ye	ear 12.0			1				
Enter manual payout		Annual Savings						
		O Annual fixed savings						
Request Additional Rider Remove In	icome Rider							
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to f	ollowing years v	vhen blank

Step 14: Clicking: After clicking on the Pick Years green button, the term "fixed" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

					YOUR CASE L	LIST SETTINGS	HELP	SIGN OUT
Manage Accour	nt.					1		
	View / Edit Death Benefit View / Edit Actual Values							
Save Cancer View / Eult income	view / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income Data		
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME				ariable 75,000	-
Hypothetical return	3.0 %		Pick year(s)				75,000 75,000	
Bonus	0.0 %	Liquidate or annuitize	OR	0			75,000	
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan				75,000 75,000	
Account description		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR				75,000	
Optional account company		O Elquidate account (in so many years)					75,000	
Other			Start year for X years	ä	9 f	fixed 7	75,000	
Tay coloulation option	Television Distribution (Constraint)	Withdrawals	0		10 f	fixed 7	75,000	
Tax calculation option	Tax Income Distributions (Qualified)	Annual fixed withdrawal		ň	11 f	fixed 7	75,000	
Add money later - deferred account			Pick year(s) to remove	õ	12 f	fixed 7	75,000	
Years deferred	0	Annual percentage withdrawal     0.0 %			13 f	fixed 7	75,000	
		<ul> <li>Required minimum distribution (RMD)</li> </ul>			14 f	fixed 7	75,000	
Asset plan allocation	Moderate Sel		Remove year to end of plan		15 f	fixed 7	75,000	
Diale lavel		<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>			16 f	fixed 7	75,000	
Risk level	Moderate		-		17 f	fixed 7	75,000	
Account owner	~		Reset all years		18 f	fixed 7	75,000	
		Calculated Plan Withdrawals			19 f	fixed 7	75,000	
Account type	IRA 🗸	<ul> <li>Make-up total owners RMD from one account</li> </ul>					75,000	
Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>					75,000	
Based on 💿 age 🔾	Client2 's age O Joint	Make-up total benef RMD from one account			22 f		75,000	
Select income rider		<ul> <li>Make-up income gap based on target income</li> </ul>					75,000	-
	~			-	24 f	fixed 7	75.000	
Number of months of payout in first y	lear 12.0							
Enter manual payout		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove I	ncome Rider							
Orange backgrounds indicate hy	pothetical returns		Note that enter	ed val	ues WILL NOT	roll down to following	g years wh	en blank

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

					YOUR	CASE LIST SET	TINGS HELP	SIGN 0
Manage Accour	1							
	View / Edit Death Benefit View / Edit Actual Values							
Save Cancel View / Edit Income	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income E	Data	
In ial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME		Year 1	Income fixed	Variable 75,000	-
Hypothetical return	3.0 %	0	Pick year(s)		2	fixed	75,000 75,000	
Bonus	0.0 %	Liquidate or annuitize	OR		4	fixed	75,000	
Optional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		5	fixed	75,000 75,000	
Account description		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR	10	7	fixed	75,000	
Optional account company		O Equidate decount (in so many years)			8	fixed	75,000	
Other			Start year for X years		9	fixed	75,000	
Tat calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10	fixed	75,000	
rat calculation option	Tax Income Distributions (Qualified)	Annual fixed withdrawal			11	fixed	75,000	
Acd money later - deferred account			Pick year(s) to remove		12	fixed	75,000	
Years deferred	0	Annual percentage withdrawal     0.0 %			13	fixed	75,000	
		<ul> <li>Required minimum distribution (RMD)</li> </ul>			14	fixed	75,000	
Asset plan allocation	Moderate Sel	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>	Remove year to end of plan		15	fixed	75,000	
Ri k level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>			16 17	fixed	75,000	
			Reset all years		18	fixed	75,000 75,000	
Account owner	~		Reset all years		19	fixed	75,000	
Account type	IRA Y	Calculated Plan Withdrawals			20	fixed	75,000	
Add an income rider	IRA V	<ul> <li>Make-up total owners RMD from one account</li> </ul>			21	fixed	75,000	
	Client2 's age O Joint	<ul> <li>Make-up total benef RMD from one account</li> </ul>			22	fixed	75,000	
	Client2 's age O Joint	O Make-up income gap based on target income			23	fixed	75,000	
Select income rider	~	· · · · · · · · · · · · · · · · · · ·		9	24	fixed	75 000	-
Number of months of payout in first ye	ear 12.0			4				P
Enter manual payout 📄		Annual Savings						
		Annual fixed savings						
Request Additional Rider Remove In	ncome Rider	<u> </u>						
Orange backgrounds indicate hyp	pothetical returns		Note that ente	red va	lues WILL	NOT roll down to	following years w	hen blank

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

0										YOUR CASE LIST SETTINGS HELP SIG
		-								PREPARED BY:
		_								INITIAL PLAN DATE:
CLIENT DASHBO	ARD STR	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	ET ALLOCATIO	ON AND NET W	RTH GRAPHS REPORTS TOOLS	REVISED PLAN DATE:
Structu	ured I	ncom	e Plar	nning						
					dd Target	dit or Add Scer	ario Displa	v Ontions		
Eun Save C	Add	ACCOUNT AC	A meetine A		tuu Target	un of Add Scen	Displa	y options		
			-							
Scenario With	ndrawing Mon	ey IRA Annua	Fixed Wtihdr	aw Function			~			
		· · ·								
		Acco	unts 🔎							
lanning			21020							
Planning Horizon	16 years ∨		IRA			Incomes				
	-			Accounts	Planned		Total			
Year		Account	Income	Total	Distribution	SS	Income	Year		
net return	70	3.00 %	IRA							
initial amount		2,000,000		2,000,000	Subtotal	Manage				
bonus % w/bonus		0.00 % 2,000,000	Manager	0 2,000,000	of account incomes	Infl Factor 3.20 %				
end of 1	71	1,985,000	Manage 75,000	1,985,000	75,000	16,969	91,969	end of 1		
end of 2	72	1,969,550	75,000	1,969,550	75,000	17,512	92,512	end of 2		
end of 2	73	1,953,636	75,000	1,953,636	75,000	18,072	93.072	end of 3		
end of 4	74	1,937,246	75,000	1,933,030	75,000	18,651	93,672	end of 4		
end of 5	75	1,920,363	75,000	1,920,363	75,000	19,248	94,248	end of 5		
end of 6	76	1,902,974	75,000	1,920,303	75,000	19,240	94,240	end of 6		
end of 7	77	1,885.063	75,000	1,885,063	75,000	20,499	95,499	end of 7		
end of 8	78	1,866,615	75,000	1,866,615	75,000	21,155	96,155	end of 8		
end of 9	79	1,847,613	75,000	1,847,613	75,000	21,832	96,832	end of 9		
end of 10	80	1,828,041	75,000	1,828,041	75,000	22,531	97,531	end of 10		
end of 11	81	1,807,883	75,000	1,807,883	75,000	23,252	98,252	end of 11		
end of 12	82	1,787,119	75,000	1,787,119	75,000	23,996	98,996	end of 12		
end of 13	83	1,765,732	75,000	1,765,732	75,000	24,764	99,764	end of 13		
end of 14	84	1,743,704	75,000	1,743,704	75,000	25,556	100,556	end of 14		
end of 15	85	1,721,016	75,000	1,721,016	75,000	26,374	101,374	end of 15		
end of 16	86	1,697,646	75,000	1,697,646	75,000	27,218	102,218	end of 16		
ond of TO		1,017,040	1.200.000	1,077,040	1.200.000	347,490	1.547.490	0.10 01 10		
					1,200,000	047,490	1,047,490			
Orange ba	ckgrounds in	dicate hypoth	etical returns							

## Option C: Start Year for X Years:

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

Initial account balance \$2,000,000 Income Ride	t payout from income rider  t payout from income rider  Pick year(s)  OR  4
Save         Cancel         View / Edit Income         View / Edit Death Benefit         View / Edit Actual Values           Account name         IRA         Structure           Initial account balance         \$2,000,000         Start pa	ADD INCOME Year Income Variable  t payout from income rider  Pick year(s)  OR  4
Initial account balance \$2,000,000 Start p	ADD INCOME Year Income Variable  t payout from income rider  Pick year(s)  OR  4
Initial account balance \$2,000,000 Start p	ADD INCOME Year Income Variable  t payout from income rider  Pick year(s)  OR  4
Start pi	t payout from income rider  t payout from income rider  Pick year(s)  OR  4
	Pick year(s) 2 OR 4
	OR 3 4
Bonus 0.0 %	o o o populitizo
Liquidate or	5
	uitize (for years certain) 1.0 % Start year for rest of plan 6
Account description Otional account company	idate account (in so many years) 7
Other	Start year for X years
Guier	
Tax calculation option Tax Income Distributions (Qualified)	vals
	ual fixed withdrawal Pick year(s) to remove
Add money later - deferred account	ual percentage withdrawal 0.0 %
Asset plan allocation Moderate Sel	uired minimum distribution (RMD) Remove year to end of plan
	eficial IRA RMD (based on beneficiaries life) 16
Risk level Moderate	17
Account owner	Reset all years 18
Calculated F	ed Plan Withdrawals
	te-up total owners RMD from one account
Add an income rider Make-u	te-up total benef RMD from one account
Based on 💿 age 🔿 Client2 's age 🔿 Joint	
Select income rider	te-up income gap based on target income
Number of months of payout in first year 12.0	4
Enter manual payout Annual Savi	avinne
	avings ual fixed savings
Request Additional Rider Remove Income Rider	
Orange backgrounds indicate hypothetical returns	Note that entered values WILL NOT roll down to following years when blank

Step 18: Annual Fixed Withdrawal Text Box: Enter in the monetary amount as a number. SIPS does not recognize the dollar sign; it only accepts number with or without commas. For example: 5,000;5000;-5,000; or -5000.

				Y	YOUR CASE LIST SET	TINGS HELP	SIGN OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
Account name	IRA	Structured Income Type			Income [	lata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Year		Variable	
mitul decourt bulance	\$2,000,000	<ul> <li>Start payout from income rider</li> </ul>		1			
Hypothetical return	3.0 %		Pick year(s)	2			
Bonus	0.0 %		OR	4			
Optional		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description			OR	6			
Optional account company		<ul> <li>Liquidate account (in so many years)</li> </ul>					
Other			Start year for X years	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	10			
		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			
rears deterred	0	Required minimum distribution (RMD)		14			
Asset plan allocation	Moderate Sel		Remove year to end of plan	15			
Risk level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>		16			
			Reset all years	18			
Account owner	<b>`</b>	Calculated Plan Withdrawals		19			
Account type	IRA 🗸	O Make-up total owners RMD from one account		20			
Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>		21			
Based on 💿 age 🔾 🕯	Client2 's age O Joint	O Make-up income gap based on target income		23			
Select income rider	~	O make up moome gap based on target moome		24			
Number of months of payout in first ye	ear 12.0						
Enter manual payout		Annual Savings					
Request Additional Rider Remove Ir	ncome Rider	Annual fixed savings					
Orange backgrounds indicate hy			Note that enter	red values	WILL NOT roll down to	following years w	hen blank

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

Structured income Type   income Rides   pothetical return   30 %   00 %   Liquidate or annuitze   00 %   Liquidate or annuitze   00 %   Diptional account company   Other   Calculated on points   1 ax income Distributions (Qualified) ~   Withdrawals   0 Annual freed withdrawal   0 Annual freed withdrawal   0 Annual precentage withdrawal   0 Maderate   cocuunt owner   x calculation option   dat necome Type   mark deferred   0 Maderate   cocuunt owner   x calculated Plan Withdrawals   0 Maderate    0 Mader						YOU	JR CASE LIST SETTIN	IGS HELP	SIGN OU
Ret Ret   Ret       Submet All Ret All Ret All All All All All All All All All Al	Manage Accour	ht.							
coount name IRA   tail account balance 5200000   pothetical return 30 %   nus 00 %   coount description 00 %   Optional account description 10 %   Optional account descript									
structure       Structure Type       income Bides         pothetical return       30 %       Pick year(s)       3         mus       00 %       Istart payout from income rider       Pick year(s)       3         shoal       00 %       Liquidae or annuitze       00 %       3         Account description       00 %       Liquidae account (ins om any years)       00 %       3         other       10 %       Start year for rest of plan       6         other       00 %       00 %       00 %       00 %         diquidate account (ins om any years)       00 %       00 %       00 %         other       00 %       00 %       00 %       00 %         diquidate account (ins om any years)       00 %       00 %       00 %       00 %         start payout from income fider       00 %       00 %       00 %       00 %       00 %         start payout ford viethdrawal       00 % <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>									
tial account balance \$2000000   pothetical return 30 %   mus 00 %   Uquidate or annuitize 0 Required form income rider   Pick year(s) 3   Account description 0 %   Optional account company 0 %   Other 0 %   Account description 0 %   Optional account company 0 %   Other 0 %   Account description 0 %   Optional account (in so many years) 0 %   Account description 0 %   Optional account (in so many years) 0 %   Account description 0 %   Optional account 0 %   Account description 0 %   Optional account (in so many years) 0 %   Account description 0 %   Account description 0 %   Optional account 0 %   Account description 0 %   Optional account 0 %   Account description 0 %   Optional account 0 %   Account description 0 %   Account description 0 %   Account description 0 %   Account description 10 %   Account description 0 % <tr< td=""><td>Account name</td><td>IRA</td><td>Structured Income Type</td><td></td><td>¥</td><td></td><td>Income Data</td><td>3</td><td></td></tr<>	Account name	IRA	Structured Income Type		¥		Income Data	3	
start payout from income rider     OR	Initial account balance	\$2,000,000	Income Riders	ADD INCOME	Ċ.		Income	Variable	*
muss 00%   Account description Annuitize (for years certain)   Optional account company 1.0%   Optional account company Cludidate account (in so many years)   Other Start year for X years   oth money later - defered account 0   oth annual fixed withdrawals 0.00%   ex calculation option Tax Income Distributions (Qualified)   Withdrawals 0.00%   ex calculation option Tax Income Distributions (Qualified)   Withdrawals 0.00%   ext defered account 0   o Annual fixed withdrawal   asd defered 0.00%   ext later - defered account 0.00%   o Required minimum distribution (RMD)   beneficial IRA RMD (based on beneficiaries life)   occunt towner 12   isk level Maderate   asd on @ age   imber offer 0   asd on @ age   inter manual payout Make-up total owners RMD from one account   inter manual payout 0	Hupothatical ratura		<ul> <li>Start payout from income rider</li> </ul>						
Inclus 0.0 %     Iter description   Optional account description   Optional account company   Other     Iter deferred account   0   ars deferred     0   0     Moderate     Start year for rest of plan     0     Iter deferred account   0     0     Vithdrawals   0   0     0     0     Vithdrawals     0     0     0     0     0     Vithdrawals     0     0     0     0     0     0     0     0     Vithdrawals     0	Hypothetical return	3.0 70			ŏ	3			
Account description   Optional account company   Other   Account in trax income Distributions (Qualified)   Withdrawals   I dononey later - deferred account   I aras deferred   I dononey later - deferred account   I aras deferred	Bonus	0.0 %	Liquidate or annuitize	U.S.		4			
Answer   Other   Other   Annual fixed withdrawals   Image: Client2's age   Joint   Beter income rider   ased on @   ased on @   Age: Client2's age   Joint   Beter income rider   ased on @   Age: Client2's age   Joint   Beter income rider   ased on @   Aset planal payout   Make-up total benef RMD from one account   Image: Client2's age   Joint   Beter income rider   ased on @   Age: Client2's age   Joint   Beter income rider   Asset planal payout   Annual fixed savings	Optional		O Annuitize (for years certain) 1.0 %	Start year for rest of plan		5			
Other Start year for X years   o Tax Income Distributions (Qualified)   wthdfawals   Image: Income Distributions (Qualified)   Image: Income			O Liquidate account (in so many years)	OR		7			
xx calculation option Tax Income Distributions (Qualified)   withdrawals   id money later - deferred account   iars deferred   iars deferred   iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii				Start year for Y years					
x calculation option Tax Income Distributions (Qualified)   withdrawais   id money later - deferred account   iars deferred   iars deferred   iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii									
dd money later - deferred account   aars deferred   aars defe	Tax calculation option	Tax Income Distributions (Qualified)							
and occurds   asset plan allocation   Moderate   sk level   Moderate   count owner   Count owner   Count owner   Count owner   Count owner   Count owner   Calculated Plan Withdrawals   Calculated Plan Withdrawals   Make-up total benef RMD from one account   ased on @   age   Client2's age   Joint   elect income rider   umber of months of payout in first year   ter manual payout   Annual Savings   Annual fixed savings	Add money later - deferred account		00,000	Pick year(s) to remove					
sester plan allocation Moderate   sk level Moderate   beneficial IRA RMD (based on beneficiaries life)   count owner   count owner   count type   RRA   age   Client2's age   Joint   elect income rider   umber of months of payout in first year   12.0   Annual Savings    Annual fixed savings	Years deferred	0							
sk level Moderate   bcount owner IT   bcount owner Reset all years   bcount owner IRA   count type IRA   id an income rider Make-up total owners RMD from one account   ased on @ age   client2's age Joint   elect income rider It   umber of months of payout in first year 12.0   ter manual payout Annual Savings   Annual Savings	Asset plan allocation	Moderate Sel	<ul> <li>Required minimum distribution (RMD)</li> </ul>	Remove year to end of plan	ä				
Image: Column of the second of th	Risk level	Madanta	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>		Ö				
Calculated Plan Withdrawals   0   bit percent of the result of the	Nor level	Moderate		Desetall					
count type IRA   d a nicome rider   ased on (a) age   client2's age   Joint   Make-up total owners RMD from one account   20   21   Make-up total benef RMD from one account   22   Make-up total benef RMD from one account   23   where up income gap based on target income   23   action on the remained payout     Annual Savings	Account owner	~	Calculated Plan Withdrawals	Reset all years					
Additional Rider Remove Income Rider  Annual Savings  Annual fixed	Account type	IRA 🗸				20			
ased on age Client2 sage Joint Make-up income gap based on target income elect income rider 120 Annual Savings Annual fixed savings Annual fixed savings	Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>						
elect noome inder		Client2 's age O Joint	Make-up income gap based on target income						
Annual Savings Annual fixed savings Annual fixed savings Annual fixed savings	Select income rider				-00	24			*
Annual Savings		ear 12.0							
Request Additional Rider Remove Income Rider	Enter manual payout								
	Request Additional Rider Remove Ir	ncome Rider	Annual fixed savings						
		A de la desensa de la desen		Note that ente	red va	alues W	ILL NOT roll down to fol	owing years y	when blank

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

				YOUR C	ASE 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	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME	Year 1	Income	Variable	^
Hypothetical return	3.0 %		Pick year(s)	2			
Bonus Optional Account description Optional account company Other	0.0 %	Liquidate or annuitize Annuitize (for years certain) Liquidate account (in so many years)	OR Start year for rest of plan OR Start year for X years	4 5 6 7 8			
Tax calculation option Add money later - deferred account Years deferred Asset plan allocation	Tax Income Distributions (Qualified)	Withdrawals <ul> <li>Annual fixed withdrawal</li> <li>0.0</li> <li>Annual percentage withdrawal</li> <li>0.0</li> <li>Required minimum distribution (RMD)</li> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>	Pick year(a) to remove	9 10 11 12 13 14 15 16			ł
Risk level Account owner Account type Add an income rider	IRA V	Calculated Plan Withdrawals Make-up total owners RMD from one account Make-up total benef RMD from one account	Reset all years	17 18 19 20 21			
Based on  age General age Based on  Based on	Client2 's age O Joint	Make-up income gap based on target income		22 23 4			+
Enter manual payout	icome Rider	Annual Savings Annual fixed savings	Note that enter	ed values WILL	NOT roll down to follo	wing years wh	nen blank

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

					YOUR CA	SE LIST SET	TINGS HELP	SIGN
Manage Accoun	)†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	IRA	Structured Income Type				Income D	ata	
Initial account balance	\$2,000,000	Income Riders	ADD INCOME		Year	Income	Variable	
		<ul> <li>Start payout from income rider</li> </ul>	v		1			
Hypothetical return	3.0 %		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			OR		6			
Optional account company		<ul> <li>Liquidate account (in so many years)</li> </ul>			8			
Other			Start year for X years	ŏ	9			
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	20		10			
Add money later - deferred account		Annual fixed withdrawal 80,000	Pick year(s) to remove		11 12			
Add money later - deferred account Years deferred	0	Annual percentage withdrawal     0.0 %			13			
	0	Required minimum distribution (RMD)			14			
Asset plan allocation	Moderate Sel		Remove year to end of plan		15			
Risk level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>			16 17			
			Reset all years		18			
Account owner	~	Calculated Plan Withdrawals			19			
Account type	IRA 🗸	O Make-up total owners RMD from one account			20			
Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>			21			
Based on 💿 age 🔿 C	Client2 's age O Joint	O Make-up income gap based on target income			23			
Select income rider	~	O make up moone gap based on target moone		3	24			
Number of months of payout in first ye	12.0							,
Enter manual payout		Annual Savings						
		O Annual fixed savings						
Request Additional Rider Remove In								
Orange backgrounds indicate hyp	oothetical returns		Note that ente	ered va	ues WILL N	IOT roll down to	following years w	vhen blan

Step 22: Clicking: After clicking on the Pick Years green button, the term "fixed" should automatically appear in the income column and numeric amount should automatically appear in the variable column of the table.

				YOUR CA	ASE LIST	HELP SIGN	N OUT
Manage Accour	nt						
	View / Edit Death Benefit View / Edit Actual Values						
					+		
Account name	IRA	Structured Income Type			Income Data		
Initial account balance	\$2,000,000	Income Riders O Start payout from income rider	ADD INCOME	Year 1		ariable	
Hypothetical return	3.0 %	Start payout non meone nuer	Pick year(s)	2		0,000	
Bonus	0.0 %		OR	3 4		0,000	
Optional		Liquidate or annuitize O Annuitize (for years certain) 1.0 %	Start year for rest of plan	5		0,000	
Account description			OR	6		0,000	
Optional account company		<ul> <li>Liquidate account (in so many years)</li> </ul>				0,000	
Other			Start year for X years	°		0,000	
			0	10		0,000	
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals		11		0,000	
Add money later - deferred account		Annual fixed withdrawal	Pick year(s) to remove	12	fixed 8	0,000	
Years deferred	0	Annual percentage withdrawal     0.0 %		13	fixed 8	0,000	
24		<ul> <li>Required minimum distribution (RMD)</li> </ul>		14	fixed 8	0,000	
Asset plan allocation	Moderate Sel		Remove year to end of plan	15		0,000	
Risk level	Moderate	<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>		16		0,000	
Horrerer	Modelate		C	17		0,000	
Account owner	~		Reset all years	18		0,000	
		Calculated Plan Withdrawals		19 20		0,000	
Account type	IRA ~	<ul> <li>Make-up total owners RMD from one account</li> </ul>		20	inked 0	5,000	
Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>		22			
Based on 💿 age 🔿 0	Client2 's age 🔘 Joint	<ul> <li>Make-up income gap based on target income</li> </ul>		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			4			
Enter manual payout		Annual Savings					
		Annual fixed savings					
Request Additional Rider Remove In	ncome Rider						
Orange backgrounds indicate hyp	nothetical returns		Note that enter	d values WILL N	NOT roll down to following	n vears when blar	ink
- orange sackgrounds indicate ny	porteriour recurring.		Note that enter	A TUIGED THEET	to From dominito following	j jearo mier biar	

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

					YOUR CASE LIST	SETTINGS HELP SIGN
Manage Accoun	it.					
	View / Edit Death Benefit View / Edit Actual Values					
Account name	IRA					
		Structured Income Type	ADD INCOME	V	ear Income	Variable
In ial account balance	\$2,000,000	<ul> <li>Start payout from income rider</li> </ul>	ADDINGOME		1 fixed	80,000
Hypothetical return	3.0 %	0	Pick year(s)		2 fixed	80,000
			OR		3 fixed	80,000
Bonus	0.0 %	Liquidate or annuitize		0	4 fixed 5 fixed	80,000
O <mark>r</mark> tional		Annuitize (for years certain) 1.0 %	Start year for rest of plan		6 fixed	80,000
Account description		<ul> <li>Liquidate account (in so many years)</li> </ul>	OR		7 fixed	80,000
Optional account company		C	Contraction and the second		8 fixed	80,000
Other			Start year for X years		9 fixed	80,000
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0		10 fixed	80,000
		Annual fixed withdrawal	Pick year(s) to remove		11 fixed 12 fixed	80,000
Acd money later - deferred account Years deferred		Annual percentage withdrawal     0.0 %	The year (b) to remote		12 fixed	80,000
rears deletted	0			0	14 fixed	80,000
Asset plan allocation	Moderate Sel	<ul> <li>Required minimum distribution (RMD)</li> </ul>	Remove year to end of plan		15 fixed	80,000
Risk level		<ul> <li>Beneficial IRA RMD (based on beneficiaries life)</li> </ul>			16 fixed	80,000
RISK level	Moderate		(c)	<u> </u>	17 fixed	80,000
Account owner	~		Reset all years		18 fixed	80,000
Assaulthing		Calculated Plan Withdrawals			19 fixed 20 fixed	80,000 80,000
Account type Add an income rider	IRA ~	<ul> <li>Make-up total owners RMD from one account</li> </ul>		<u> </u>	21	00,000
	Client2 's age O Joint	<ul> <li>Make-up total benef RMD from one account</li> </ul>			22	
		O Make-up income gap based on target income			23	
Select income rider	~			- ·	24	• •
Number of months of payout in first ye	12.0					,
Enter manual payout		Annual Savings				
		Annual fixed savings				
Request Additional Rider Remove In	come Rider					
Orange backgrounds indicate hyp	oothetical returns		Note that enter	red value	es WILL NOT roll dowr	to following years when blan

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

	SETTINGS   HELP	
CLENT DASHBOARD       STRUCTURED INCOME PLANNING       CASH FLOW AND TAX ADVISOR       ASET ALLOCATION AND NET WORTH       GRAPHS       REPORTS       TOOLS         Structured Income Planning         Marking Money IRA Annu Fleed Withdraw Function         Vithdrawing Money IRA Annu Fleed Withdraw Function         Notice	PREPARED BY:	
Structured Income Planning           Earl Save Caned Add Account At Income Add Inc Tax Add Targe Earl or Add Scenario Display Options           Scenario Withdrawing Money IRA Annu Fixed Withdraw Function           Concest           Verar         Concest           Concest           Verar         Note Counts         Planning           16 years Y         IRA           Incomest           Year         Note Counts         Planning           2.000.000         Subtorial         Manage           IRA         Incomest           Manage         2.000.000         Subtorial         Manage           Interteum         70         3.000         Manage           and of 2         72         1.959:400         8.0000         1.959:400         8.0000         1.959:400         8.0000         1.959:400         8.0000         1.959:400         8.0000         1.959:400         8.0000 <th colsp<="" td=""><td>TIAL PLAN DATE:</td></th>	<td>TIAL PLAN DATE:</td>	TIAL PLAN DATE:
Edit         Save         Cancel         Add Account         At         Income         Add IncTax         Add Target         Edit or Add Scenario         Display Options           Scenario         Withdrawing Money IRA Annu         Fixed Withdraw Function	SED PLAN DATE:	
Edit         Save         Cancel         Add Account         At         Income         Add IncTax         Add Target         Edit or Add Scenario         Display Options           Scenario         Withdrawing Money IRA Annu         Fixed Withdraw Function		
Scenario         Withdrawing Money IRA Annu, Fixed Withdraw Function           Accounts         Accounts         Income           RA         Income         Total         Distribution           Year         Account         Income         Total         Distribution         SS           Initial amount         Total         Distribution         SS         Total         Year           One         Account         IRA         Manage         Manage         Manage           Initial amount         IRA         Comme         SS         Total         Manage           Initial amount         IRA         Comme         Signal         Manage         Manage           Withorts         Ono         Subtota         Manage         Manage         Manage         Manage           Initial amount         You         Status         Manage         Status         Manage         Manage           end of 1         71         1880.000         1980.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000         1800.000 <td></td>		
Incomes           Incomes           Incomes           Total           Incomes           Total           Incomes           Vear         Account         Incomes         Vear           Interval         Statution         Statution         Vear           Interval		
I to years         Income           Year         Account         Income         Planned Distribution         SS         Total Income         Year           net return borus %         70         300 %         IRA         2,000,000         SS         Total Distribution         %         Year           net return borus %         70         300 %         IRA         2,000,000         SS         Total Distribution         %         Year           end of 1         71         1,980,000         80,000         1,980,000         1,75,12         end of 1         end of 2         end of 3         73         1,383,817         80,000         1,75,12         end of 3         end of 7         end of 7         1,38		
Manning Iorizon         16 years         Icourts         Planed Distribution         Status           Year         Account         Income         Accounts         Planed Distribution         SS         Total Income         Year           met return Initial amounts         70         2.000,000 0.00         Gounds         Subtrait         Menage Inf Factor         Year           whomus         0.00 %         00         of account         Subtrait         Menage Inf Factor         Year           end of 1         71         1.980,000         B80,000         1.990,000         B00,000         17,512         end of 2           end of 3         73         1.938,182         B00,000         17,512         98,651         end of 3           end of 4         74         1.916,327         80,000         1.954,812         80,000           end of 5         75         1.893,817         B0.000         1.893,817         B0.000           end of 6         76         1.870,682         80,000         1.954,800         99,863           end of 7         1.893,817         B0.000         1.822,153         B0.000         1.832,81           end of 7         1.893,817         B0.000         1.822,153         B0.000         1.		
Manning Iorizon         16 years         Icourts         Planed Distribution         Status           Year         Account         Income         Accounts         Planed Distribution         SS         Total Income         Year           met return Initial amounts         70         2.000,000 0.00         Gounds         Subtrait         Menage Inf Factor         Year           whomus         0.00 %         00         of account         Subtrait         Menage Inf Factor         Year           end of 1         71         1.980,000         B80,000         1.990,000         B00,000         17,512         end of 2           end of 3         73         1.938,182         B00,000         17,512         98,651         end of 3           end of 4         74         1.916,327         80,000         1.954,812         80,000           end of 5         75         1.893,817         B0.000         1.893,817         B0.000           end of 6         76         1.870,682         80,000         1.954,800         99,863           end of 7         1.893,817         B0.000         1.822,153         B0.000         1.832,81           end of 7         1.893,817         B0.000         1.822,153         B0.000         1.		
Horizon         Lincome         Income         Account         Plannon         Total         Vear           Tet return         70         3.00 %         Income         Account         Plannon         SS         Total         Vear           initial amount         70         3.00 %         IRA         2.000.00         Subtat         Menope         Vear           initial amount         0.00 %         IRA         2.000.00         Subtat         Menope         Vear           end of 1         71         1.880.000         1.800.00         Income         3.20 %         Vear           end of 2         72         1.989.400         80.000         1.980.000         1.980.000         1.980.000         1.980.000         1.980.000         1.980.000         1.993.182         80.000         1.7512         end of 2           end of 3         73         1.989.400         80.000         1.954.97         80.000         1.8572         98.072         end of 3           end of 4         74         1.916.527         80.000         1.827.85         80.000         1.92.48         end of 5           end of 7         77         1.484.750         80.000         1.822.153         80.000         2.18.82         1.00		
Year         Account         Income         Account Total         Planned         Year           Inet return         3.00 %         IRA         2.000.00         Statut         Total         Year           initia arount         0.00 %         IRA         2.000.00         Statut         Mnnnec         3.20 %           whonus         2.000.00         Mnnnec         2.000.00         Statut         Mnnnec         3.20 %           end of 1         71         1.980.000         80.000         1.980.000         80.000         17.512         end of 2           end of 3         73         1.938.182         80.000         17.512         end of 3         end of 4           end of 5         75         1.983.817         80.000         18.651         end of 4           end of 5         75         1.983.817         80.000         19.86.30         9.94.83         end of 7           end of 6         76         1.876.82         80.000         1.86.51         9.94.83         end of 7           end of 7         1.846.750         80.000         1.86.51         9.92.83         end of 7           end of 7         77         1.846.750         80.000         2.18.52         101.499         end o		
Year         Account         Income         Total         Distribution         Second         Plear           Initial amount bonus %         70         3.00 %         IRA		
Inet return Initial around bonus %         70         3.00 %         IRA           Jonus %         0.00 %         0         Subtata         Manage           widsous         2.000.000         0         of account         Inf Factor           end of 1         71         1.860.000         80.000         1.69.69         96.969         end of 1           end of 2         72         1.959.400         80.000         1.98.69         96.969         end of 2           end of 3         73         1.938.102         80.000         1.93.812         80.000         18.072         end of 3           end of 4         74         1.916.327         80.000         1.93.812         80.000         1.93.823         end of 5           end of 5         75         1.829.817         80.000         1.93.823         89.648         end of 5           end of 6         76         1.870.523         80.000         1.93.823         99.648         end of 6           end of 7         77         1.846.750         80.000         1.80.72         80.000         1.94.84         99.648         end of 7           end of 7         79         1.846.750         80.000         1.94.84         99.648         end of 6     <		
bonus %         0.00 %         0 of accurit         Inf Factor           whonus         200000         Monson         200000         incomes         320 %           end of 1         71         1,980,000         1990,000         80,000         16,969         96,969         end of 1           end of 2         72         1,959,400         80,000         19,94,00         80,000         17,512         97,512         end of 2           end of 3         73         1,938,182         80,000         1,939,400         80,000         18,072         end of 3           end of 4         74         1,916,327         80,000         1,936,327         80,000         19,248         99,248         end of 5           end of 6         76         1,870,532         80,000         1,824,518         80,000         19,248         99,248         end of 6           end of 7         1,846,750         80,000         1,824,518         80,000         12,842         end of 6           end of 7         1,822,153         80,000         1,748,84         80,000         21,832         end of 1           end of 11         81         1,748,844         80,000         1,748,84         80,000         23,396         end of 12		
withomus         v         2.000,000         Mmappe         2.000,000         incomes         32.0         v         end           end of 1         71         1,950,000         80,000         1,980,000         80,000         16,969         96,969         end of 1           end of 3         72         1,959,400         80,000         1,980,000         80,000         17,512         97,512         end of 2           end of 3         73         1,938,182         80,000         19,93,182         80,000         18,651         end of 4           end of 4         74         1,915,327         80,000         19,83,77         80,000         19,84,651         end of 5           end of 5         75         1,893,817         80,000         19,84,82         80,000         19,84,82         end of 5           end of 7         76         1,804,575         80,000         19,84,83         end of 5         end of 7         end of 7         1,846,750         80,000         21,852         end of 7         end of 7         1,846,750         80,000         21,832         end of 9         end of 9         1,79,848         80,000         21,832         end of 1         end of 1         end of 1         80,000         1,77,722         8		
end of 1         71         1380,000         80,000         16,969         96,969         end of 1           end of 2         72         1358,400         80,000         1958,400         80,000         17,512         end of 1           end of 3         73         1,938,182         80,000         19,512         98,072         end of 3           end of 4         74         1316,527         80,000         19,512         98,072         end of 3           end of 5         73         1,938,182         80,000         18,512         98,072         end of 3           end of 5         75         1,938,17         80,000         18,93,817         80,000         19,248         end of 5           end of 6         76         1,870,652         80,000         19,843         99,648         end of 6           end of 7         7         1,846,750         80,000         19,843         99,648         end of 7           end of 7         7         1,846,750         80,000         1,843,21         end of 7           end of 1         79         1,776,818         80,000         21,832         101,832         end of 10           end of 11         81         1,776,722         80,000 <t< td=""><td></td></t<>		
end of 2         72         1959,400         80,000         1959,400         80,000         136,72         97,512         end of 2           end of 3         73         1,386,182         80,000         1,959,400         180,072         98,072         end of 3           end of 4         74         1,316,327         80,000         1,80,812         80,000         18,051         end of 4           end of 5         75         1,893,817         80,000         19,863         end of 6           end of 6         76         1,870,632         80,000         19,863         end of 6           end of 7         77         1,846,750         80,000         19,863         end of 7           end of 7         77         1,346,750         80,000         12,155         end of 7           end of 7         78         1,322,153         80,000         12,155         end of 7           end of 9         79         1,796,818         80,000         12,155         end of 8           end of 10         80         1,770,722         80,000         1,723,522         end of 11           end of 11         81         1,748,844         80,000         23,525         103,596         end of 12		
end of 3         73         1938.182         80.000         19.38.182         80.000         19.38.172         99.072         end of 3           end of 5         75         1.893.817         80.000         19.63.27         80.000         19.64.27         99.672         end of 3           end of 5         75         1.893.817         80.000         19.24.8         99.248         end of 5           end of 6         76         1.870.632         80.000         19.86.3         99.863         end of 5           end of 7         1.845.50         80.000         1.86.51         80.004         end of 6           end of 7         7         1.845.50         80.000         1.84.55         80.000         end of 7           end of 7         1.822.153         80.000         1.822.153         80.000         21.832         end of 9           end of 10         80         1.770.722         80.000         22.351         101.52         end of 1           end of 11         81         1.748.44         80.000         23.926         103.256         end of 11           end of 13         83         1.867.644         80.000         23.926         103.296         end of 12           end of 13         <		
end of 4         74         1916.327         80.000         19.16.327         80.000         19.64.37         80.000         19.63.27         80.000         19.248         99.248         end of 5           end of 5         75         1.893.817         80.000         1.893.817         80.000         19.248         99.248         end of 5           end of 7         76         1.846.750         80.000         1.863.750         80.000         12.428         99.248         end of 6           end of 7         77         1.846.750         80.000         1.863.750         80.000         12.458         101.455         end of 7           end of 7         78         1.847.570         80.000         1.241.55         80.000         21.155         101.155         end of 8           end of 10         80         1.770.722         80.000         1.723.52         101.852         end of 10           end of 11         81         1.748.844         80.000         22.551         103.252         end of 11           end of 12         82         1.716.159         80.000         23.252         103.592         end of 13           end of 14         84         1.658.748         80.000         24.764         104.764		
end of 5         75         1893.817         80.000         1893.817         80.000         192.48         992.48         end of 5           end of 6         76         1,870.832         80.000         1,870.632         80.000         192.48         992.48         end of 5           end of 7         77         1,846.750         80.000         1,870.632         80.000         12.870.632         end of 7           end of 8         78         1,842.750         80.000         1,822.153         80.000         21.832         end of 7           end of 9         796.818         80.000         1.770.722         80.000         21.832         end of 19           end of 10         80         1,770.722         80.000         23.252         103.252         end of 10           end of 11         81         1,748.44         80.000         23.252         103.252         end of 12           end of 12         82         1,716.159         80.000         23.554         103.596         end of 12           end of 13         83         1,687.644         80.000         24.764         104.764         end of 13           end of 14         84         1,658.273         80.000         25.556         105.556		
end of 6         76         1,870,632         80,000         1,870,632         80,000         19,863         99,863         end of 6           end of 7         77         1,846,750         80,000         1,847,50         20,499         100,499         end of 7           end of 8         78         1,822,153         80,000         1,251,51         80,000         21,155         101,155         end of 8           end of 9         79         1,796,818         80,000         1,796,818         80,000         22,531         101,832         end of 9           end of 10         80         1,770,722         80,000         1,776,189         80,000         1,743,844         80,000         23,252         end of 11           end of 12         82         1,716,159         80,000         1,743,844         80,000         24,764         end of 13           end of 14         84         1,658,273         80,000         24,764         104,764         end of 13           end of 15         85         1,628,021         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         25,574         106,374         end of 16           end of 15		
end of 7         77         1,846,750         80,000         1,846,750         80,000         12,46,750         80,000         12,46,750         80,000         12,46,750         80,000         12,46,750         80,000         12,155         101,155         end of 7           end of 9         79         1,796,818         80,000         1,70,722         80,000         21,155         101,155         end of 9           end of 10         80         1,770,722         80,000         1,770,722         80,000         22,531         102,531         end of 10           end of 11         81         1,728,844         80,000         1,23,552         end of 11         end of 12         82         1,716,159         80,000         22,552         end of 11           end of 12         82         1,716,159         80,000         24,764         80,000         24,764         end of 13           end of 14         84         1,658,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         26,374         106,374         end of 16           end of 15         86         1,598,682         80,000         27,218         107,218         end of 16		
end of 8         78         1822153         80.000         122153         101155         end of 8         end of 8           end of 9         79         1796818         80.000         1.76818         80.000         21.832         end of 8           end of 10         80         1.770,722         80.000         22.531         101.832         end of 10           end of 11         81         1.743,844         80.000         1.770,722         80.000         23.525         103.252         end of 11           end of 12         82         1.71519         80.000         1.761,59         80.000         23.595         end of 12           end of 13         83         1.667,644         80.000         25.556         end of 14         end of 14           end of 14         44         1.682,73         80.000         1.652,827         80.000         25.556         end of 14           end of 15         85         1.628,021         80.000         25.556         end of 16           end of 15         86         1.558,682         80.000         27.218         106,374         end of 16		
end of 9         79         1.796,818         80.000         1.796,818         80.000         1.786,818         end of 9           end of 10         80         1.770,722         80.000         1.770,722         80.000         22,531         101,832         end of 10           end of 11         81         1.743,844         80.000         1.743,844         80.000         23,252         103,252         end of 11           end of 12         82         1.716,159         80.000         1.743,844         80.000         23,252         103,252         end of 13           end of 13         83         1.657,644         80.000         1.674,644         80.000         24,764         end of 13           end of 14         84         1.658,273         80.000         25,556         105,556         end of 14           end of 15         1.628,021         80.000         25,556         105,556         end of 16           end of 15         85         1.628,021         80.000         27,218         107,218         end of 16		
end of 11         81         1,743,844         80,000         1,743,844         80,000         23,252         103,252         end of 11           end of 12         82         1,716,159         80,000         1,716,159         80,000         23,956         103,956         end of 13           end of 13         33         1,857,644         80,000         1,87,644         80,000         24,764         end of 13           end of 14         84         1,658,273         80,000         1,658,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         1,508,602         80,000         27,218         107,218         end of 16		
end of 12         82         1,716,159         80,000         1,716,159         80,000         23,96         103,996         end of 12           end of 13         83         1,887,644         80,000         1,877,644         80,000         24,764         end of 13           end of 14         84         1,658,273         80,000         1,658,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         26,374         106,374         end of 15           end of 15         86         1,596,862         80,000         27,218         107,218         end of 16		
end of 13         83         1,687,644         80,000         1,687,644         80,000         24,764         104,764         end of 13           end of 14         84         1,658,273         80,000         1,658,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         1,628,021         80,000         26,374         106,374         end of 15           end of 16         86         1,596,862         80,000         1,596,862         80,000         27,218         107,218         end of 16		
end of 14         84         1,658,273         80,000         1,582,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         1,628,021         80,000         26,374         106,374         end of 15           end of 16         86         1,595,6862         80,000         27,218         107,218         end of 16		
end of 15         85         1,628,021         80,000         1,628,021         80,000         26,374         106,374         end of 15           end of 16         86         1,596,862         80,000         1,596,862         80,000         27,218         107,218         end of 16		
end of 16 86 1,596,862 80,000 1,596,862 80,000 27,218 107,218 end of 16		
1,200,000 1,200,000 347,430 1,027,430		

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:
LIENT DASHBO	OARD STR	UCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	SET ALLOCATIO	ON AND NET W	TH GRAPHS REPORTS TOOLS	REVISED PLAN DATE:
ruct	ured I	ncom	e Plar	nnina						
			d Income A		Add Target	Edit or Add Scen	ario Displa	y Options		
cenaric With	thdrawing Mon	ey IRA Annua	I Fixed Wtihdr	aw Function			$\sim$			
		Acco	ounts							
lanning	16 years ∨		IRA			Incomes				
_				Accounts	Planned	1	Total	Marca		
Year		Account	Income	Total	Distribution	SS	Income	Year		
net re urn	70	3.00 %	IRA							
itial amount		2,000,000 0.00 %		2,000,000	Subtotal of account	Manage Infl Factor				
bonus % w/bonus		2,000,000	Manage	2,000,000	incomes	3.20 %				
end of 1	71	1,980,000	80,000	1.980.000	80.000	16,969	96,969	end of 1		
end of 2	72	1,959,400	80,000	1,959,400	80,000	17,512	97,512	end of 2		
end of 3	73	1,938,182	80,000	1,938,182	80,000	18,072	98,072	end of 3		
end of 4	74	1,916,327	80,000	1,916,327	80,000	18,651	98,651	end of 4		
end of 5	75	1,893,817	80,000	1,893,817	80,000	19,248	99,248	end of 5		
end of 6	76	1,870,632	80,000	1,870,632	80,000	19,863	99,863	end of 6		
end of 7	77	1,846,750	80,000	1,846,750	80,000	20,499	100,499	end of 7		
end of 8	78	1,822,153	80,000	1,822,153	80,000	21,155	101,155	end of 8		
end of 9	79	1,796,818	80,000	1,796,818	80,000	21,832	101,832	end of 9		
end o 10	80	1,770,722	80,000	1,770,722	80,000	22,531	102,531	end of 10		
end of 11	81	1,743,844	80,000	1,743,844	80,000	23,252	103,252	end of 11		
end of 12	82	1,716,159	80,000	1,716,159	80,000	23,996	103,996	end of 12		
end of 13	83	1,687,644	80,000	1,687,644	80,000	24,764	104,764	end of 13		
end of 14	84	1,658,273	80,000	1,658,273	80,000	25,556	105,556	end of 14		
end of 15	85	1,628,021	80,000	1,628,021	80,000	26,374	106,374	end of 15		
end of 16	86	1,596,862	80,000	1,596,862	80,000	27,218	107,218	end of 16		
					1,280,000	347,490	1,627,490			

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.

INITIAL PLAN DAT REVISED PLAN											YOUR CASE LIST SETTINGS	
											PREPARED BY:	
Non-colspan="2">Non-colspan="2"Non-colspan="2"Non-colspan="2"Non-colspan="2"Non-colspan="2"Non-cols											INITIAL PLAN DATE:	
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ario       Withdrawing Money IRA Annual Fixed Withdraw Function         ing       16 years       Accounts         Income       Accounts         ing       16 years       IRA         Vear       Account       Income         1 dyears       Income         2 dyear       Account       Income         2 dyear       Account       Income         2 dyear       Account       Income         2 dyear       Account       Income         2 dyear       2 dyear       Account       Income         2 dyear       2 dyear       Account       Income         2 dyear       2 dyear       Income       S dyear         1 dyear       1 dyear       Income       S dyear         1 dyear       1 dyear       Income       S dyear         1 dyear       1 dyear       Income       S dyear <td></td> <td></td> <td>ICOIII</td> <td>e i iai</td> <td>ming</td> <td></td> <td></td> <td></td> <td></td> <th></th> <td></td>			ICOIII	e i iai	ming							
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						1,200,000	547,490	1,027,490				

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										YOUR CASE LIST SETTINGS
										PREPARED BY:
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CLIENT DASHBOA	RD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	SET ALLOCATIO	ON AND NET W	TH   GRAPHS   REPORTS   TOOLS	REVISED PLAN DATE:
Structu	ired Ir	ncom	e Plar	nina						
Edit Save Ca			d Income A		Add Target	Edit or Add Scen	Displa	u Optione		
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Scenario Withd	awing Mon	ev IRA Annua	l Fixed Wtihdr	raw Function			$\sim$			
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Planning 1 Horizon	years 🗸		IRA			Incomes				
Year		Account	Income	Accounts Total	Planned Distribution	SS	Total Income	Year		
net return	70	3.00 %	IRA		Distribution					
initial amount		2,000,000		2,000,000	Subtotal	Manage				
bonus %		0.00 %		0	of account	Infl Factor				
w/bonus		2,000,000	Manage	2,000,000	incomes	3.20 %				
end of 1	71	1,980,000	80,000	1,980,000	80,000	16,969	96,969	end of 1		
end of 2	72	1,959,400	80,000	1,959,400	80,000	17,512	97,512	end of 2		
end of 3	73	1,938,182	80,000	1,938,182	80,000	18,072	98,072	end of 3		
end of 4 end of 5	74 75	1,916,327 1,893,817	80,000 80,000	1,916,327 1,893,817	80,000 80,000	18,651 19,248	98,651 99,248	end of 4 end of 5		
end of 6	75	1,893,817	80,000	1,893,817	80,000	19,248	99,248	end of 5 end of 6		
end of 6 end of 7	70	1,870,632	80,000	1,870,632	80,000	20,499	99,863	end of 6 end of 7		
end of 8	78	1,846,750	80,000	1,846,750	80,000	20,499	100,499	end of 8		
end of 9	79	1,022,155	80,000	1,022,155	80,000	21,155	101,135	end of 9		
end of 10	80	1,770,722	80,000	1,770,722	80,000	22,531	102,531	end of 10		
end of 11	81	1,743,844	80,000	1,743,844	80,000	23,252	102,331	end of 11		
end of 12	82	1,745,644	80,000	1,745,644	80,000	23,252	103,252	end of 12		
end of 13	83	1,687,644	80,000	1,687,644	80,000	24,764	104,764	end of 13		
end of 14	84	1.658.273	80,000	1.658.273	80.000	25,556	105,556	end of 14		
end of 15	85	1,628,021	80,000	1,628,021	80,000	26,374	106,374	end of 15		
end of 16	86	1,596,862	80.000	1.596.862	80.000	27,218	107,218	end of 16		
0100110		1,000,002	1,280,000	1,000,002	1,280,000	347,490	1,627,490			

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 HELP
CLUENT DASHBOARD       STRUCTURED INCOME PLANNING       CASH FLOW AND TAX ADVISOR       ASET ALLOCATION AND NET WORTH       ORAPHS       TOOLS       REVISED PLAN DATE         Structured Income Planning         Dig       Dig       REPORTS       TOOLS       REVISED PLAN DATE         Somario         Accounts       Accounts       Accounts         Accounts       Total       Planning         Notation of accounts       Planning       Total       Planned         Vear       Account       Income s <sup>2</sup> Vear       Account       Infector       Infector       Indicate       Planned         Vear       Account       Infector       Indicate       Indicate       Indicate       Indicate       Indicate       Indicate         Viburus       Sound       Sound       Sound       Indicate         Viburus       Viburus       Viburus       Viburus       Viburus       Viburus </td <td></td> <td>PREPARED BY:</td>											PREPARED BY:
Accounts         Planning         Income         Accounts         Plannet           Vibridrawing Money IRA Annual Fixed Withdraw Function               Planning         16 years         IRA               Vibridrawing Money IRA Annual Fixed Withdraw Function <td></td> <td>INITIAL PLAN DATE:</td>											INITIAL PLAN DATE:
Edit         Dynamic Mode           Scenario         Withdrawing Money IRA Annual Fixed Withdraw Function           Accounts         Accounts         Incomes           Vear         Account         Planned Totazo         SS         Total           Intel amount         70         300 %         IRA         Incomes           Intel amount         72,000,000         Mozar         Inf Factor         Vear           ond of 2         72         1,994,000         800,000         1989,400         800,000         175,12         97,512         end of 1           end of 1         73         1,989,400         800,000         1989,400         800,000         1989,480         800,000         1989,482         800,000         1989,482         800,000         1989,483         end of 4           74         1,980,000         800,000         1989,482         800,000         1989,482         800,000         1988,487         99,488         end of 5         96,651         end of 4         74         1,916,327         800,000         198,483         99,483         end of 6         75         1,883,475         800,000         198,483         99,483         end of 6         75         1,883,480         800,000         198,483         99,483	CLIENT DASHBO	ARD STRU	ICTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR ASS	ET ALLOCATIO	ON AND NET W	RTH   GRAPHS   REPORTS   TOOLS	REVISED PLAN DATE:
Edit         Dynamic Mode           Scenario         Withdrawing Money IRA Annual Fixed Withdraw Function           Accounts         Accounts         Incomes           Vear         Account         Planned Totazo         SS         Total           Intel amount         70         300 %         IRA         Incomes           Intel amount         72,000,000         Mozar         Inf Factor         Vear           ond of 2         72         1,994,000         800,000         1989,400         800,000         175,12         97,512         end of 1           end of 1         73         1,989,400         800,000         1989,400         800,000         1989,480         800,000         1989,482         800,000         1989,482         800,000         1989,483         end of 4           74         1,980,000         800,000         1989,482         800,000         1989,482         800,000         1988,487         99,488         end of 5         96,651         end of 4         74         1,916,327         800,000         198,483         99,483         end of 6         75         1,883,475         800,000         198,483         99,483         end of 6         75         1,883,480         800,000         198,483         99,483	Struct	ured Ir	ncom	e Plar	nina						
Scenario         Withdrawing Money IRA Annual Fixed Withdraw Function           Accounts         Accounts         IRA           Incomes         Incomes           Year         Account         Incomes           Initial anount         Incomes         Incomes           Initial anount         Insolution         Subtrait         Interaction         Year           end of 1         71         1980.000         IRA         Incomes         Year           end of 1         71         1980.000         IRA         2,000,000         Subtrait         Interaction           end of 1         71         1980.000         IRA         2,000,000         Subtrait         Interaction           end of 1         71         1980.000         80,000         17,512         97,512         end of 1           end of 3         73         198,182         80,000         138,812         80,000         138,812         80,000         139,823         98,683         end of 5           end of 6         76         187,053         80,000         139,2183         99,683         end of 5           end of 5         77         18,45750         80,000         12,484         99,248         end of 6         for 1     <			100111	c i iui	innig						
Vear         Accounts         Incomes           Year         Account         Income         Accounts         Planned Distribution         SS         Total         Year           net return bonus %         70         300 % 2,000,000         Income         Account Distribution         SS         Total Incomes         Year           end of 1         71         1,980,000         80,000         1,980,000         Subtotal Incomes         Inf Factor of account         Bit Fibribution         SS         Total Incomes         Year           end of 1         71         1,980,000         80,000         1,582         97,512         end of 2         end of 2           end of 3         73         1,938,182         80,000         1,959,400         80,000         1,8561         end of 4           end of 5         75         1,989,317         80,000         1,8661         end of 5         end of 7         1,846,750         80,000         1,984,83         end of 7           end of 6         76         1,870,832         80,000         1,863         99,863         end of 7           end of 7         1,846,750         80,000         1,863         99,863         end of 7           end of 7         1,846,750         80,000 <td>Dynamic</td> <td>: Mode</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Dynamic	: Mode									
Vear         Accounts         Incomes           Year         Account         Income         Accounts         Planned Distribution         SS         Total         Year           net return botus 5         0.00 % 0.00 %         IRA         2.000,000         Subtotal of account         Inf Factor         1           end of 1         71         1.980,000         8.000         1.996,000         80,000         1.696,99         96,969         end of 1           end of 2         72         1.998,000         80,000         1.996,000         80,000         1.7512         97,512         end of 2           end of 3         73         1.938,182         80,000         1.86,651         end of 4           end of 5         75         1.989,817         80,000         1.896,817         89,000         1.86,651           end of 4         76         1.876,822         80,000         1.89,817         89,248         end of 5           end of 7         1.984,817         80,000         1.86,851         end of 6         76         1.876,828         80,000         1.89,817         80,000         1.89,817           end of 5         75         1.984,817         80,000         1.24,84         80,000         1.93,82,81	Scenario With	ndrawing Mone	ev IRA Annual	Fixed Wtihdr	aw Function			~			
Naming torizon         16 years         16 years         16 years         16 years         16 years           Year         Accounts         Income         Accounts         Distribution         SS         Total Income         Year           met return Initial amounts         70         2.000,000         RA         2.000,000         Subtrait         Infl Factor         Year           whomus         0.00 %         RA         2.000,000         Subtrait         Infl Factor         Year           end of 1         71         1.980,000         80.000         1.696.99         96.666         end of 2           end of 3         73         1.938,182         80.000         1.7512         98.072         end of 3           end of 4         74         1.916.327         80.000         1.8651         98.651         end of 4           end of 5         75         1.893.817         80.000         1.8651         99.248         end of 6           end of 7         77         1.847.51         80.000         1.863.99         98.663         end of 7           end of 7         789.818         80.000         1.863.93         99.863         end of 6           end of 7         1.847.870         80.000 <t< td=""><td></td><td></td><td>,</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>			,								
International Horizon         Internet Incomes         Incomes         Incomes           Year         Incomes         Incomes         Secont         Incomes         Year           Intel arrown Initial arrown wohonus         70         3.00 % 0.00 %         Incomes         Subtrained of account         Subtrained of account         Year           end of 1         71         1.980,000 0.00 %         Subtrained of account			Acco	unts 📈							
Horizon         Line public         IRA         Income         Accounts         Planed         Other public           Year         70         Accounts         Income         Accounts         Planed         SS         Total         Year           net return         70         2000,000         IRA         2,000,000         Subtrained         off Factor         Year           initial amounts         0.00 %         0.00 %         2,000,000         Subtrained         Inf Factor         Year           end of 1         71         1,980,000         80,000         1,980,000         80,000         17,512         end of 2         end of 2           end of 3         73         1,938,182         80,000         17,512         98,072         end of 3           end of 4         74         1,916,327         80,000         19,9483         99,863         end of 5           end of 6         76         1,877,652         80,000         19,8483         99,863         end of 7           end of 6         76         1,876,852         80,000         1,874,23         end of 7           end of 7         1,845,750         80,000         1,822,153         80,000         1,248         99,248         end of 7	Dianning		ACCO								
Year         Account         Income         Total         Distribution         SS         Income         Year           Initial amount bonus         70         3.00 % 0.00 %         IRA 0.00 %         2.000,000         Subotal of account         Init Factor         Init Factor           end of 1         71         1.980,000         80,000         1.980,000         80,000         1.980,000         80,000         1.980,000         80,000         1.980,000         80,000         1.980,000         80,000         1.980,000         1.880,000         1.886,01         end of 2         end of 3         end of 4         end of 5         75         1.893,817         80,000         1.98,813         98,483         end of 5         end of 6         end of 7         1.846,750         80,000         2.18,83         1.01,849         end of 7           end of 1         76         1.886,74		16 years ∨	i i	IRA			Incomes				
Instituti and Initial anounti bonus %         70         300 %         IRA         2,000,000         Subtata           Initial anounti bonus %         0,00 %         2,000,000         Subtata         Im Factor         3.20 %           end of 1         71         1,980,000         80,000         1,994,000         80,000         15,969         96,969         end of 1           end of 2         72         1,959,400         80,000         1,959,400         80,000         17,512         97,512         end of 2           end of 4         74         1,916,327         80,000         1,934,82         80,000         18,072         end of 5           end of 6         76         1,870,632         80,000         1,984,83         99,863         end of 5           end of 6         76         1,870,632         80,000         1,984,83         99,863         end of 6           end of 7         1,844,750         80,000         1,822,153         80,000         1,824,85         end of 6           end of 7         1,822,153         80,000         1,284,89         end of 7         end of 8           end of 10         80         1,770,722         80,000         1,284,89         end of 10           end of 11	Year		Account	Income			SS		Year		
bonus %         0.00 %         0 of accumt         Imf Factor           wiborus         2000.000         2000.000         320 %         400 f           end of 1         71         1,980.000         80.000         16,969         96,069         end of 1           end of 2         72         1,959,400         80.000         17,512         97,512         end of 2           end of 3         73         1,981,42         80.000         19,812         80.000         18,072         end of 3           end of 4         74         1,916,327         80.000         19,818         80.000         19,248         end of 5           end of 6         76         1,870,632         80.000         1,892,178         80.000         19,248         end of 5           end of 7         1,846,750         80.000         1,892,183         80.000         19,248         end of 6           end of 7         77         1,846,750         80.000         1,842,155         80.000         2,11,82         end of 9           end of 10         80         1,770,722         80.000         1,274,225         end of 1           end of 11         81         1,746,844         80.000         1,23,252         end of 1	net return	70	3.00 %	IRA	Total	Distribution		income			
withomus         Image: Provide and Provide Andrea Andr											
end of 1         71         1980,000         80,000         1980,000         80,000         195940           end of 2         72         1959,400         80,000         195940         80,000         17,512         end of 1           end of 3         73         1383,182         80,000         195,400         80,000         18,651         98,672         end of 3           end of 4         74         1,916,327         80,000         19,548         80,000         19,248         90,248         end of 5           end of 6         75         1,893,817         80,000         1,893,817         80,000         19,248         99,248         end of 5           end of 6         76         1,870,632         80,000         1,893,817         80,000         19,248         99,248         end of 5           end of 7         1,484,550         80,000         1,893,817         80,000         21,982         end of 7           end of 7         1,484,550         80,000         21,585         101,455         end of 8           end of 18         78,182         80,000         1,770,722         80,000         21,382         end of 11           end of 11         81         1,776,484         80,000         2											
end of 2         72         1959,400         80,000         1959,400         80,000         175,12         97,512         end of 2           end of 3         73         1,938,182         80,000         1,938,182         80,000         1,86,72         98,072         end of 3           end of 4         74         1,916,327         80,000         1,86,51         80,000         192,623         end of 4           end of 5         75         1,893,817         80,000         192,823         80,000         192,823         end of 5           end of 6         76         1,870,523         80,000         19,863         end of 5         end of 5           end of 7         77         1,846,750         80,000         1,948,9248         end of 7           end of 7         77         1,346,750         80,000         1,215,51         80,000         2,155         end of 7           end of 1         78         1,322,153         80,000         2,155         101,155         end of 8           end of 1         80         1,770,722         80,000         2,2531         102,352         end of 11           end of 11         81         1,728,444         80,000         2,3252         103,392         end											
end of 3         73         1,933,182         80,000         19,381,182         80,000         19,381,72         98,072         end of 3           end of 4         74         1,916,327         80,000         19,632,7         80,000         19,632,7         80,000         19,632,7           end of 5         75         1,893,817         80,000         19,248         99,248         end of 5           end of 6         76         1,870,632         80,000         18,651         99,663         end of 6           end of 7         77         1,847,55         80,000         1,845,55         80,000         20,499         end of 7           end of 8         78         1,822,153         80,000         21,832         end of 9         end of 9           end of 10         80         1,770,722         80,000         21,832         end of 10           end of 11         81         1,748,44         80,000         22,525         103,252         end of 12           end of 13         83         1,687,644         80,000         22,556         end of 13           end of 13         83         1,687,644         80,000         22,556         end of 13           end of 14         84         1,582,											
end of 4         74         1916327         80.000         1916327         80.000         1916327         80.000         1916327         80.000         1916327         80.000         19248         end of 4           end of 6         75         1,893,817         80.000         1,893,817         80.000         1,9248         99,248         end of 6           end of 7         76         1,876,532         80.000         1,883,817         80.000         2,9363         end of 6           end of 7         77         1,846,750         80.000         1,821,53         80.000         2,1515         end of 7           end of 9         79         1,796,818         80.000         1,721,53         80.000         2,1852         end of 9           end of 1         80         1,770,722         80.000         1,770,722         80.000         2,2531         end of 10           end of 11         81         1,748,844         80.000         2,3252         ind of 10         end of 12         82         1,716,159         80.000         2,3252         ind of 13           end of 12         82         1,716,159         80.000         2,3254         ind of 14         end of 13           end of 14         84         <											
end of 5         75         1893817         80.000         1893817         80.000         19248         99248         end of 5           end of 6         76         1870.632         80.000         1.893.817         80.000         19248         99248         end of 5           end of 7         77         1.246,750         80.000         1.870.632         80.000         1.9848         99.863         end of 7           end of 7         77         1.246,750         80.000         1.822,153         80.000         21.455         101.455         end of 8           end of 9         79         1.776,722         80.000         1.770,722         80.000         1.723,523         end of 1           end of 10         80         1.770,722         80.000         1.232,513         end of 1         102,351         end of 1           end of 11         81         1.748,844         80.000         2.2,521         end of 1         103,292         end of 1           end of 12         82         1.716,159         80.000         2.2,556         end of 1         end of 1           end of 14         84         1.658,273         80.000         2.5,556         end of 14         end of 16         end of 16											
end of 6         76         1,870,632         80,000         1,870,632         80,000         19,863         99,863         end of 6           end of 7         77         1,346,750         80,000         1,847,750         80,000         20,499         100,499         end of 7           end of 7         78         1,822,153         80,000         1,215,51         80,000         21,155         101,155         end of 8           end of 9         79         1,796,818         80,000         1,796,818         80,000         22,531         102,831         end of 9           end of 10         80         1,770,722         80,000         1,72,528         end of 10         end of 11           end of 11         81         1,743,844         80,000         23,252         103,252         end of 11           end of 12         82         1,716,159         80,000         23,252         103,252         end of 13           end of 12         83         1,877,644         80,000         24,764         104,764         end of 13           end of 14         84         1,558,273         80,000         25,556         105,556         end of 14           end of 15         162,80,21         80,000         1,558,673<											
end of 7         77         1246/520         80.000         1246/520         80.000         1246/520         80.000         1246/520         80.000         1246/520         80.000         1246/520         80.000         1246/520         80.000         121/55         101/55         end of 7           end of 9         79         1.796,818         80.000         1.796,818         80.000         1.7832         101,832         end of 9           end of 10         80         1.776,722         80.000         1.770,722         80.000         22,531         102,531         end of 10           end of 11         81         1.748,844         80.000         1.748,444         80.000         23,252         end of 11           end of 12         82         1.716,159         80.000         23,252         end of 12         83         1.877,444         80.000         24,744         103,956         end of 13           end of 14         84         1.658,273         80.000         25,556         105,556         end of 14           end of 15         85         1.62,8021         80.000         25,556         105,556         end of 16           end of 15         85         1.62,8021         80.000         25,374         106,37											
end of 8         78         1.822.153         80.000         1.822.153         80.000         21.85         101.155         end of 8           end of 9         79         1.796.818         80.000         1.746.818         80.000         21.832         end of 8           end of 10         80         1.770.722         80.000         21.832         101.832         end of 10           end of 11         81         1.743.844         80.000         1.743.844         80.000         23.252         103.252         end of 11           end of 12         82         1.716.159         80.000         1.743.844         80.000         23.252         103.252         end of 12           end of 13         83         1.687.644         80.000         2.7474         104.744         end of 12           end of 14         41         1.687.744         80.000         2.55.56         end of 14           end of 15         85         1.628.021         80.000         2.55.56         end of 14           end of 15         85         1.628.001         1.628.021         80.000         2.57.54         105.556         end of 16           end of 15         86         1.58.9682         80.000         2.57.54         107.218 </td <td></td>											
end of 9         79         1.796/s18         80.000         1.796/s18         80.000         1.796/s18         80.000         1.796/s18         80.000         1.796/s18         80.000         1.796/s18         80.000         1.278/s18         end of 19           end of 11         81         1.748/s84         80.000         1.748/s44         80.000         22,531         102,531         end of 10           end of 12         82         1.716,159         80.000         1.748/s44         80.000         23,252         end of 13           end of 13         83         1.687/s44         80.000         24,764         100,396         end of 13           end of 14         84         1.658/273         80.000         25,556         105,556         end of 14           end of 15         85         1.628,021         80.000         25,556         105,556         end of 14           end of 16         86         1.568,682         80.000         26,374         106,374         end of 16											
end of 11         81         1,743,844         80,000         1,743,844         80,000         23,252         103,252         end of 11           end of 12         82         1,716,159         80,000         1,716,159         80,000         23,996         103,996         end of 13           end of 13         83         1,857,644         80,000         1,875,644         80,000         24,764         end of 13           end of 14         84         1,558,273         80,000         1,657,654         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         1,658,273         80,000         26,374         end of 15           end of 16         86         1,598,862         80,000         1,592,8021         80,000         27,218         end of 16											
end of 12         82         1,716,159         80,000         1,716,159         80,000         23,996         103,996         end of 12           end of 13         83         1,887,644         80,000         1,637,644         80,000         24,764         end of 13           end of 14         84         1,658,273         80,000         1,658,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         25,556         105,556         end of 14           end of 15         86         1,596,862         80,000         27,218         107,218         end of 16	end of 10	80	1,770,722	80,000	1,770,722	80,000	22,531	102,531	end of 10		
end of 13         83         1,687,644         80,000         1,687,644         80,000         24,764         104,764         end of 13           end of 14         84         1,558,273         80,000         1,558,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,227         80,000         1,632,021         80,000         26,374         end of 15           end of 16         86         1,596,862         80,000         1,572,18         106,374         end of 16	end of 11	81	1,743,844	80,000	1,743,844	80,000	23,252	103,252	end of 11		
end of 14         84         1,658,273         80,000         1,658,273         80,000         25,556         105,556         end of 14           end of 15         85         1,628,021         80,000         1,628,021         80,000         26,374         end of 15           end of 16         86         1,595,6862         80,000         1,595,622         80,000         27,218         end of 16			1,716,159			80,000			end of 12		
end of 15         85         1,628,021         80,000         1,628,021         80,000         26,374         106,374         end of 15           end of 16         86         1,596,862         80,000         1,596,862         80,000         27,218         107,218         end of 16											
end of 16 86 1,596,862 80,000 1,596,862 80,000 27,218 107,218 end of 16											
1,280,000 1,280,000 347,490 1,627,490	end of 16	86	1,596,862		1,596,862				end of 16		
				1,280,000		1,280,000	347,490	1,627,490			

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