

# View Income Riders Function

11/06/2024 10:25 am EST

On the structured income planning page, you can view income riders for annuity accounts. This function is available through the display options. Below is a step-by-step guideline for displaying income riders.

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

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these, it says 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main heading is 'Structured Income Planning' with an 'Edit' button and 'Dynamic Mode' text. A 'Scenario' dropdown is set to 'Display Income Rider'. A 'Planning Horizon' dropdown is set to '20 years'. Below this is a table with columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Incomes' (Wages, SS), and 'Total Income'. The table shows data from year 60 to 80. Orange backgrounds highlight certain cells, indicating hypothetical returns. A legend at the bottom states: 'Orange backgrounds indicate hypothetical returns'.

Year	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
60	0.01 %	1.50 %	125,000	125,000				
end of 1	25,002	0	126,502	0	150,000	0	150,000	end of 1
end of 2	25,005	0	128,028	0	153,300	0	153,300	end of 2
end of 3	25,008	0	129,575	0	156,673	0	156,673	end of 3
end of 4	25,010	0	131,146	0	160,119	0	160,119	end of 4
end of 5	25,013	0	132,741	0	0	30,530	30,530	end of 5
end of 6	25,015	0	134,359	0	0	31,202	31,202	end of 6
end of 7	25,018	0	136,002	0	0	31,888	31,888	end of 7
end of 8	25,020	0	137,669	0	0	32,590	32,590	end of 8
end of 9	25,023	0	139,362	0	0	33,307	33,307	end of 9
end of 10	25,025	0	138,924	7,130	0	34,039	41,169	end of 10
end of 11	25,028	0	138,429	7,130	0	34,788	41,918	end of 11
end of 12	25,030	0	137,881	7,130	0	35,554	42,683	end of 12
end of 13	25,033	0	137,289	7,130	0	36,336	43,465	end of 13
end of 14	25,035	0	136,642	7,130	0	37,135	44,265	end of 14
end of 15	25,038	0	135,950	7,130	0	37,952	45,082	end of 15
end of 16	25,040	0	135,219	7,130	0	38,787	45,917	end of 16
end of 17	25,043	0	134,459	7,130	0	39,640	46,770	end of 17
end of 18	25,045	0	133,670	7,130	0	40,512	47,642	end of 18
end of 19	25,048	0	132,859	7,130	0	41,404	48,533	end of 19
end of 20	25,050	0	132,026	7,130	0	42,315	49,444	end of 20
		0	78,426	78,426	620,092	577,978	1,276,496	

Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

## Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario: Display Income Rider

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			Wages	SS		
net return	60	0.01 %		1.50 %						
initial amount		25,000		100,000	125,000	Subtotal of account incomes	Manage Inf Factor	Manage Inf Factor		
bonus % w/bonus		0.00 %		0.00 %	125,000		2.20 %	2.20 %		
end of 1	61	25,002	0	101,500	126,502	0	150,000	0	150,000	end of 1
end of 2	62	25,005	0	103,022	128,028	0	153,300	0	153,300	end of 2
end of 3	63	25,008	0	104,568	129,575	0	156,673	0	156,673	end of 3
end of 4	64	25,010	0	106,136	131,146	0	160,119	0	160,119	end of 4
end of 5	65	25,013	0	107,728	132,741	0	0	30,530	30,530	end of 5
end of 6	66	25,015	0	109,344	134,359	0	0	31,202	31,202	end of 6
end of 7	67	25,018	0	110,984	136,002	0	0	31,888	31,888	end of 7
end of 8	68	25,020	0	112,649	137,669	0	0	32,590	32,590	end of 8
end of 9	69	25,023	0	114,339	139,362	0	0	33,307	33,307	end of 9
end of 10	70	25,025	0	108,924	133,949	7,130	0	34,039	41,169	end of 10
end of 11	71	25,028	0	103,429	128,456	7,130	0	34,788	41,918	end of 11
end of 12	72	25,030	0	97,851	122,881	7,130	0	35,554	42,683	end of 12
end of 13	73	25,033	0	92,189	117,221	7,130	0	36,336	43,465	end of 13
end of 14	74	25,035	0	86,442	111,477	7,130	0	37,135	44,265	end of 14
end of 15	75	25,038	0	80,609	105,647	7,130	0	37,952	45,082	end of 15
end of 16	76	25,040	0	74,689	99,729	7,130	0	38,787	45,917	end of 16
end of 17	77	25,043	0	68,679	93,722	7,130	0	39,640	46,770	end of 17
end of 18	78	25,045	0	62,580	87,625	7,130	0	40,512	47,642	end of 18
end of 19	79	25,048	0	56,399	81,436	7,130	0	41,404	48,533	end of 19
end of 20	80	25,050	0	50,105	75,155	7,130	0	42,315	49,444	end of 20
					0	78,426		620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 3: View Income Riders: Click on the green View Income Riders button located in the Column Display Options Table.

Column Display Options: [View RMD Checks](#) [View Income Riders](#) [View Death Benefit](#) [View % Distribution](#) [View Comparison](#) [View Tax Rates](#) [View Calendar Years](#)

### Account and Income Grouping

	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					
Savings/Checking	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annuity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incomes					
Wages	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Account or income groups must be created in the sequential order from left to right as they appear in the Income Plan.  
You may have to re-order accounts using the Edit Scenario function to achieve the sequence you want for your account/income groups.  
Reordering or adding accounts or incomes on the Edit Scenario function requires that the above group information be reset.

[Reset](#) [Condense All](#) [Uncondense All](#)

### Group Setup

Accounts		Color
Group 1	Accounts	<span style="background-color: orange; border: 1px solid gray; padding: 2px;">Se</span>
Group 2		<span style="background-color: yellow; border: 1px solid gray; padding: 2px;">Se</span>
Group 3		<span style="background-color: lightgreen; border: 1px solid gray; padding: 2px;">Se</span>
Group 4		<span style="background-color: lightblue; border: 1px solid gray; padding: 2px;">Se</span>
Group 5		<span style="background-color: lightpurple; border: 1px solid gray; padding: 2px;">Se</span>

  

Incomes		Color
Group 1	Incomes	<span style="background-color: red; border: 1px solid gray; padding: 2px;">Se</span>
Group 2		<span style="background-color: yellow; border: 1px solid gray; padding: 2px;">Se</span>
Group 3		<span style="background-color: lightgreen; border: 1px solid gray; padding: 2px;">Se</span>
Group 4		<span style="background-color: lightblue; border: 1px solid gray; padding: 2px;">Se</span>
Group 5		<span style="background-color: lightpurple; border: 1px solid gray; padding: 2px;">Se</span>

[Reset Title / Colors](#) [Copy Setup To All Scenarios](#)

[Return With Grouping](#) [Return Without Grouping](#)

Step 4: Structured Income Planning Page: A new column underneath the Annuity called Inc Rider will appear in the Structured Income Plan.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: Display Income Rider

Planning Horizon: 20 years

Year	Accounts					Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Inc Rider	Income			Wages	SS		
net return	60	0.01 %	1.50 %	6.00 %							
initial amount		25,000	100,000			125,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
bonus % w/onus		0.00 %	0.00 %	0.00 %	inc	0		2.20 %	2.20 %		
		25,000	100,000	100,000	Manage	125,000					
end of 1	61	25,002	0	101,500	106,000	0	126,502	0	150,000	0	150,000
end of 2	62	25,005	0	103,022	112,360	0	128,028	0	153,300	0	153,300
end of 3	63	25,008	0	104,568	119,102	0	129,575	0	156,673	0	156,673
end of 4	64	25,010	0	106,136	126,248	0	131,146	0	160,119	0	160,119
end of 5	65	25,013	0	107,728	133,823	0	132,741	0	0	30,530	30,530
end of 6	66	25,015	0	109,344	141,852	0	134,359	0	31,202	31,202	31,202
end of 7	67	25,018	0	110,984	150,363	0	136,002	0	31,888	31,888	31,888
end of 8	68	25,020	0	112,649	159,385	0	137,669	0	32,590	32,590	32,590
end of 9	69	25,023	0	114,339	168,948	0	139,362	0	33,307	33,307	33,307
end of 10	70	25,025	0	108,924	0	7,130	133,949	7,130	0	34,039	41,169
end of 11	71	25,028	0	103,429	0	7,130	128,456	7,130	0	34,788	41,918
end of 12	72	25,030	0	97,851	0	7,130	122,881	7,130	0	35,554	42,683
end of 13	73	25,033	0	92,189	0	7,130	117,221	7,130	0	36,336	43,465
end of 14	74	25,035	0	86,442	0	7,130	111,477	7,130	0	37,135	44,265
end of 15	75	25,038	0	80,609	0	7,130	105,647	7,130	0	37,952	45,082
end of 16	76	25,040	0	74,689	0	7,130	99,729	7,130	0	38,787	45,917
end of 17	77	25,043	0	68,679	0	7,130	93,722	7,130	0	39,640	46,770
end of 18	78	25,045	0	62,580	0	7,130	87,625	7,130	0	40,512	47,642
end of 19	79	25,048	0	56,389	0	7,130	81,436	7,130	0	41,404	48,533
end of 20	80	25,050	0	50,105	0	7,130	75,155	7,130	0	42,315	49,444
							78,426	78,426	620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 5: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: Display Income Rider

Planning Horizon: 20 years

Year	Accounts					Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Inc Rider	Income			Wages	SS		
net return	60	0.01 %	1.50 %	6.00 %							
initial amount		25,000	100,000			125,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
bonus % w/onus		0.00 %	0.00 %	0.00 %	inc	0		2.20 %	2.20 %		
		25,000	100,000	100,000	Manage	125,000					
end of 1	61	25,002	0	101,500	106,000	0	126,502	0	150,000	0	150,000
end of 2	62	25,005	0	103,022	112,360	0	128,028	0	153,300	0	153,300
end of 3	63	25,008	0	104,568	119,102	0	129,575	0	156,673	0	156,673
end of 4	64	25,010	0	106,136	126,248	0	131,146	0	160,119	0	160,119
end of 5	65	25,013	0	107,728	133,823	0	132,741	0	0	30,530	30,530
end of 6	66	25,015	0	109,344	141,852	0	134,359	0	31,202	31,202	31,202
end of 7	67	25,018	0	110,984	150,363	0	136,002	0	31,888	31,888	31,888
end of 8	68	25,020	0	112,649	159,385	0	137,669	0	32,590	32,590	32,590
end of 9	69	25,023	0	114,339	168,948	0	139,362	0	33,307	33,307	33,307
end of 10	70	25,025	0	108,924	0	7,130	133,949	7,130	0	34,039	41,169
end of 11	71	25,028	0	103,429	0	7,130	128,456	7,130	0	34,788	41,918
end of 12	72	25,030	0	97,851	0	7,130	122,881	7,130	0	35,554	42,683
end of 13	73	25,033	0	92,189	0	7,130	117,221	7,130	0	36,336	43,465
end of 14	74	25,035	0	86,442	0	7,130	111,477	7,130	0	37,135	44,265
end of 15	75	25,038	0	80,609	0	7,130	105,647	7,130	0	37,952	45,082
end of 16	76	25,040	0	74,689	0	7,130	99,729	7,130	0	38,787	45,917
end of 17	77	25,043	0	68,679	0	7,130	93,722	7,130	0	39,640	46,770
end of 18	78	25,045	0	62,580	0	7,130	87,625	7,130	0	40,512	47,642
end of 19	79	25,048	0	56,389	0	7,130	81,436	7,130	0	41,404	48,533
end of 20	80	25,050	0	50,105	0	7,130	75,155	7,130	0	42,315	49,444
							78,426	78,426	620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 6: Hide Income Riders: Click on the green Hide Income Riders button located in the Column Display Options Table.

Column Display Options **View RMD Checks** **Hide Income Riders** View Death Benefit View % Distribution View Comparison View Tax Rates View Calendar Years

### Account and Income Grouping

Accounts

	Group 1	Group 2	Group 3	Group 4	Group 5
Savings/Checking	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annuity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Incomes

	Group 1	Group 2	Group 3	Group 4	Group 5
Wages	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Account or income groups must be created in the sequential order from left to right as they appear in the Income Plan.  
 You may have to re-order accounts using the Edit Scenario function to achieve the sequence you want for your account/income groups.  
 Reordering or adding accounts or incomes on the Edit Scenario function requires that the above group information be reset.

Reset Condense All Uncondense All

### Group Setup

#### Accounts

Title	Accounts	Color	<input type="text" value="Set"/>
Group 2			<input type="text" value="Set"/>
Group 3			<input type="text" value="Set"/>
Group 4			<input type="text" value="Set"/>
Group 5			<input type="text" value="Set"/>

#### Incomes

Title	Incomes	Color	<input type="text" value="Set"/>
Group 2			<input type="text" value="Set"/>
Group 3			<input type="text" value="Set"/>
Group 4			<input type="text" value="Set"/>
Group 5			<input type="text" value="Set"/>

Reset Title / Colors Copy Setup To All Scenarios

Return With Grouping Return Without Grouping

Step 7: Structured Income Planning Page: The Inc Rider Column will be removed from the Annuity Account.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: \_\_\_\_\_  
 INITIAL PLAN DATE: \_\_\_\_\_  
 REVISED PLAN DATE: \_\_\_\_\_

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: Display Income Rider

Planning Horizon: 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			Wages	SS		
net return	60	0.01 %		1.50 %	125,000					
initial amount		25,000		100,000	125,000	Subtotal of account incomes	Manage	Manage		
w/bonus		0.00 %		0.00 %	0		2.20 %	2.20 %		
		25,000	Manage	100,000	125,000					
end of 1	61	25,002	0	101,500	126,502	0	150,000	0	150,000	end of 1
end of 2	62	25,005	0	103,022	128,028	0	153,300	0	153,300	end of 2
end of 3	63	25,008	0	104,568	129,575	0	156,673	0	156,673	end of 3
end of 4	64	25,010	0	106,136	131,146	0	160,119	0	160,119	end of 4
end of 5	65	25,013	0	107,728	132,741	0	0	30,530	30,530	end of 5
end of 6	66	25,015	0	109,344	134,359	0	0	31,202	31,202	end of 6
end of 7	67	25,018	0	110,984	136,002	0	0	31,888	31,888	end of 7
end of 8	68	25,020	0	112,649	137,669	0	0	32,590	32,590	end of 8
end of 9	69	25,023	0	114,339	139,362	0	0	33,307	33,307	end of 9
end of 10	70	25,025	0	108,924	133,949	7,130	0	34,039	41,169	end of 10
end of 11	71	25,028	0	103,429	128,456	7,130	0	34,788	41,918	end of 11
end of 12	72	25,030	0	97,851	122,881	7,130	0	35,554	42,683	end of 12
end of 13	73	25,033	0	92,189	117,221	7,130	0	36,336	43,465	end of 13
end of 14	74	25,035	0	86,442	111,477	7,130	0	37,135	44,265	end of 14
end of 15	75	25,038	0	80,609	105,647	7,130	0	37,952	45,082	end of 15
end of 16	76	25,040	0	74,689	99,729	7,130	0	38,787	45,917	end of 16
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end of 18	78	25,045	0	62,580	87,625	7,130	0	40,512	47,642	end of 18
end of 19	79	25,048	0	56,389	81,436	7,130	0	41,404	48,533	end of 19
end of 20	80	25,050	0	50,105	75,155	7,130	0	42,315	49,444	end of 20
					78,426			620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 8: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			Wages	SS		
net return	60	0.01 %	1.50 %		125,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 2.20 %		
initial amount		25,000	100,000		125,000					
bonus %		0.00 %	0.00 %		0					
w/bonus		25,000	100,000		125,000					
end of 1	61	25,002	0	101,500	0	126,502	0	150,000	150,000	end of 1
end of 2	62	25,005	0	103,022	0	128,028	0	153,300	153,300	end of 2
end of 3	63	25,008	0	104,568	0	129,575	0	156,673	156,673	end of 3
end of 4	64	25,010	0	106,136	0	131,146	0	160,119	160,119	end of 4
end of 5	65	25,013	0	107,728	0	132,741	0	30,530	30,530	end of 5
end of 6	66	25,015	0	109,344	0	134,359	0	31,202	31,202	end of 6
end of 7	67	25,018	0	110,984	0	136,002	0	31,888	31,888	end of 7
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end of 9	69	25,023	0	114,339	0	139,362	0	33,307	33,307	end of 9
end of 10	70	25,025	0	108,924	7,130	133,949	7,130	34,039	41,169	end of 10
end of 11	71	25,028	0	103,429	7,130	128,456	7,130	34,788	41,918	end of 11
end of 12	72	25,030	0	97,851	7,130	122,881	7,130	35,554	42,683	end of 12
end of 13	73	25,033	0	92,189	7,130	117,221	7,130	36,336	43,465	end of 13
end of 14	74	25,035	0	86,442	7,130	111,477	7,130	37,135	44,265	end of 14
end of 15	75	25,038	0	80,609	7,130	105,647	7,130	37,952	45,082	end of 15
end of 16	76	25,040	0	74,689	7,130	99,729	7,130	38,787	45,917	end of 16
end of 17	77	25,043	0	68,679	7,130	93,722	7,130	39,640	46,770	end of 17
end of 18	78	25,045	0	62,580	7,130	87,625	7,130	40,512	47,642	end of 18
end of 19	79	25,048	0	56,389	7,130	81,436	7,130	41,404	48,533	end of 19
end of 20	80	25,050	0	50,105	7,130	75,155	7,130	42,315	49,444	end of 20
						0				
						78,426		620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 9: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario:

Planning Horizon:

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			Wages	SS		
net return	60	0.01 %	1.50 %		125,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 2.20 %		
initial amount		25,000	100,000		125,000					
bonus %		0.00 %	0.00 %		0					
w/bonus		25,000	100,000		125,000					
end of 1	61	25,002	0	101,500	0	126,502	0	150,000	150,000	end of 1
end of 2	62	25,005	0	103,022	0	128,028	0	153,300	153,300	end of 2
end of 3	63	25,008	0	104,568	0	129,575	0	156,673	156,673	end of 3
end of 4	64	25,010	0	106,136	0	131,146	0	160,119	160,119	end of 4
end of 5	65	25,013	0	107,728	0	132,741	0	30,530	30,530	end of 5
end of 6	66	25,015	0	109,344	0	134,359	0	31,202	31,202	end of 6
end of 7	67	25,018	0	110,984	0	136,002	0	31,888	31,888	end of 7
end of 8	68	25,020	0	112,649	0	137,669	0	32,590	32,590	end of 8
end of 9	69	25,023	0	114,339	0	139,362	0	33,307	33,307	end of 9
end of 10	70	25,025	0	108,924	7,130	133,949	7,130	34,039	41,169	end of 10
end of 11	71	25,028	0	103,429	7,130	128,456	7,130	34,788	41,918	end of 11
end of 12	72	25,030	0	97,851	7,130	122,881	7,130	35,554	42,683	end of 12
end of 13	73	25,033	0	92,189	7,130	117,221	7,130	36,336	43,465	end of 13
end of 14	74	25,035	0	86,442	7,130	111,477	7,130	37,135	44,265	end of 14
end of 15	75	25,038	0	80,609	7,130	105,647	7,130	37,952	45,082	end of 15
end of 16	76	25,040	0	74,689	7,130	99,729	7,130	38,787	45,917	end of 16
end of 17	77	25,043	0	68,679	7,130	93,722	7,130	39,640	46,770	end of 17
end of 18	78	25,045	0	62,580	7,130	87,625	7,130	40,512	47,642	end of 18
end of 19	79	25,048	0	56,389	7,130	81,436	7,130	41,404	48,533	end of 19
end of 20	80	25,050	0	50,105	7,130	75,155	7,130	42,315	49,444	end of 20
						0				
						78,426		620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 10: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit Save **Cancel** Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario: Display Income Rider

Planning Horizon: 2 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			Wages	SS		
net return	60	0.01 %	1.50 %		125,000					
initial amount		25,000	100,000		125,000	Subtotal of account incomes	Manage Inf Factor	Manage Inf Factor		
bonus % w/bonus		0.00 %	0.00 %		0		2.20 %	2.20 %		
end of 1	61	25,002	0	101,500	126,502	0	150,000	0	150,000	end of 1
end of 2	62	25,005	0	103,022	128,028	0	153,300	0	153,300	end of 2
end of 3	63	25,008	0	104,568	129,575	0	156,673	0	156,673	end of 3
end of 4	64	25,010	0	106,136	131,146	0	160,119	0	160,119	end of 4
end of 5	65	25,013	0	107,728	132,741	0	0	30,530	30,530	end of 5
end of 6	66	25,015	0	109,344	134,359	0	0	31,202	31,202	end of 6
end of 7	67	25,018	0	110,984	136,002	0	0	31,888	31,888	end of 7
end of 8	68	25,020	0	112,649	137,669	0	0	32,590	32,590	end of 8
end of 9	69	25,023	0	114,339	139,362	0	0	33,307	33,307	end of 9
end of 10	70	25,025	0	108,924	133,949	7,130	0	34,039	41,169	end of 10
end of 11	71	25,028	0	103,429	128,456	7,130	0	34,788	41,918	end of 11
end of 12	72	25,030	0	97,851	122,881	7,130	0	35,554	42,683	end of 12
end of 13	73	25,033	0	92,189	117,221	7,130	0	36,336	43,465	end of 13
end of 14	74	25,035	0	86,442	111,477	7,130	0	37,135	44,265	end of 14
end of 15	75	25,038	0	80,609	105,647	7,130	0	37,952	45,082	end of 15
end of 16	76	25,040	0	74,689	99,729	7,130	0	38,787	45,917	end of 16
end of 17	77	25,043	0	68,679	93,722	7,130	0	39,640	46,770	end of 17
end of 18	78	25,045	0	62,580	87,625	7,130	0	40,512	47,642	end of 18
end of 19	79	25,048	0	56,389	81,436	7,130	0	41,404	48,533	end of 19
end of 20	80	25,050	0	50,105	75,155	7,130	0	42,315	49,444	end of 20
					0	78,426		620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

Step 11: 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 | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit Dynamic Mode

Scenario: Display Income Rider

Planning Horizon: 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Account	Income	Account	Income			Wages	SS		
net return	60	0.01 %	1.50 %		125,000					
initial amount		25,000	100,000		125,000	Subtotal of account incomes	Manage Inf Factor	Manage Inf Factor		
bonus % w/bonus		0.00 %	0.00 %		0		2.20 %	2.20 %		
end of 1	61	25,002	0	101,500	126,502	0	150,000	0	150,000	end of 1
end of 2	62	25,005	0	103,022	128,028	0	153,300	0	153,300	end of 2
end of 3	63	25,008	0	104,568	129,575	0	156,673	0	156,673	end of 3
end of 4	64	25,010	0	106,136	131,146	0	160,119	0	160,119	end of 4
end of 5	65	25,013	0	107,728	132,741	0	0	30,530	30,530	end of 5
end of 6	66	25,015	0	109,344	134,359	0	0	31,202	31,202	end of 6
end of 7	67	25,018	0	110,984	136,002	0	0	31,888	31,888	end of 7
end of 8	68	25,020	0	112,649	137,669	0	0	32,590	32,590	end of 8
end of 9	69	25,023	0	114,339	139,362	0	0	33,307	33,307	end of 9
end of 10	70	25,025	0	108,924	133,949	7,130	0	34,039	41,169	end of 10
end of 11	71	25,028	0	103,429	128,456	7,130	0	34,788	41,918	end of 11
end of 12	72	25,030	0	97,851	122,881	7,130	0	35,554	42,683	end of 12
end of 13	73	25,033	0	92,189	117,221	7,130	0	36,336	43,465	end of 13
end of 14	74	25,035	0	86,442	111,477	7,130	0	37,135	44,265	end of 14
end of 15	75	25,038	0	80,609	105,647	7,130	0	37,952	45,082	end of 15
end of 16	76	25,040	0	74,689	99,729	7,130	0	38,787	45,917	end of 16
end of 17	77	25,043	0	68,679	93,722	7,130	0	39,640	46,770	end of 17
end of 18	78	25,045	0	62,580	87,625	7,130	0	40,512	47,642	end of 18
end of 19	79	25,048	0	56,389	81,436	7,130	0	41,404	48,533	end of 19
end of 20	80	25,050	0	50,105	75,155	7,130	0	42,315	49,444	end of 20
					0	78,426		620,092	577,978	1,276,496

Orange backgrounds indicate hypothetical returns

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](mailto:support@planscout.com).