

# View Death Benefit Function

11/06/2024 10:26 am EST

On the structured Income planning page you can view death benefits for insurance policies. Below is a step-by-step guideline to view the death benefit for an insurance policy.

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: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, 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 dropdown menu shows 'Scenario: View/Hide Death Benefit Function'. Below this is a table with columns for 'Year', 'Accounts', 'Incomes', and 'Total Income'. The table includes rows for 'Initial amount', 'end of 1' through 'end of 20'. An orange arrow points to the 'Edit' button.

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year	
	Savings/Checking	Income	Account	Income			Wages	SS			
Initial amount	60	0.01 %	25,000	0	25,000	0	0	0			
Initial amount bonus % w/bonus			0.00 %	4.00 %	0	0	2.20 %	2.20 %			
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
			0		1,500,000		1,500,000	620,092	577,978	2,698,070	

Orange backgrounds indicate hypothetical returns

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

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: View/Hide Death Benefit Function

Planning Horizon: 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year	
	Account	Income	Account	Income			Wages	SS			
net return	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage Infl Factor 2.20 %	Manage Infl Factor 2.20 %			
initial amount	25,000		0		0						
bonus % w/bonus	0.00 %		4.00 %		25,000						
w/bonus	25,000	Manage	0	Manage	25,000						
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
						0			1,500,000	1,500,000	
									620,092	577,978	2,698,070

Orange backgrounds indicate hypothetical returns

Step 3: View Death Benefit: Click on the green View Death Benefit 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
<b>Accounts</b>					
Savings/Checking	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Incomes</b>					
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	Color
Group 1 Accounts	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 2	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 3	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 4	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 5	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>

**Incomes**

Title	Color
Group 1 Incomes	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 2	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 3	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 4	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>
Group 5	<span style="background-color: #FFD700; border: 1px solid gray; padding: 2px;">Set</span>

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

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

Step 4: Structured Income Plan: A new column called Death Benefit will appear under the Insurance column.

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

## Structured Income Planning

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

Scenario: View/Hide Death Benefit Function

Planning Horizon: 20 years

Year	Savings/Checking		Insurance		Death Benefit	Accounts Total	Death Benefit Total	Planned Distribution	Incomes		Total Income	Year	
	Account	Income	Account	Income					Wages	SS			
net return	0.01 %		3.00 %		0.00 %	25,000							
initial amount	25,000		0		cash value	25,000		Subtotal of account	Manage	Manage			
bonus %	0.00 %		4.00 %		0.00 %	0		incomes	Infl Factor	Infl Factor			
w/bonus	25,000	Manage	0	Manage	1,500,000	25,000	1,525,000		2.20 %	2.20 %			
end of 1	61	25,002	0	300,000	100,000	1,500,000	325,002	1,525,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	1,500,000	325,005	1,525,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	1,500,000	325,008	1,525,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	1,500,000	325,010	1,525,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	1,500,000	325,012	1,525,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	1,500,000	325,015	1,525,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	1,500,000	325,018	1,525,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	1,500,000	325,020	1,525,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	1,500,000	325,022	1,525,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	1,500,000	325,025	1,525,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	1,500,000	325,028	1,525,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	1,500,000	325,030	1,525,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	1,500,000	325,033	1,525,032	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	1,500,000	325,035	1,525,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	1,500,000	325,038	1,525,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	0	25,040	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	0	25,043	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	0	25,045	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	0	25,048	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	0	25,050	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000					1,500,000	620,092	577,978	2,698,070	

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

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

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

## Structured Income Planning

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

Scenario: View/Hide Death Benefit Function

Planning Horizon: 20 years

Year	Savings/Checking		Insurance		Death Benefit	Accounts Total	Death Benefit Total	Planned Distribution	Incomes		Total Income	Year	
	Account	Income	Account	Income					Wages	SS			
net return	0.01 %		3.00 %		0.00 %	25,000							
initial amount	25,000		0		cash value	25,000		Subtotal of account	Manage	Manage			
bonus %	0.00 %		4.00 %		0.00 %	0		incomes	Infl Factor	Infl Factor			
w/bonus	25,000	Manage	0	Manage	1,500,000	25,000	1,525,000		2.20 %	2.20 %			
end of 1	61	25,002	0	300,000	100,000	1,500,000	325,002	1,525,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	1,500,000	325,005	1,525,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	1,500,000	325,008	1,525,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	1,500,000	325,010	1,525,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	1,500,000	325,012	1,525,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	1,500,000	325,015	1,525,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	1,500,000	325,018	1,525,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	1,500,000	325,020	1,525,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	1,500,000	325,022	1,525,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	1,500,000	325,025	1,525,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	1,500,000	325,028	1,525,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	1,500,000	325,030	1,525,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	1,500,000	325,033	1,525,032	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	1,500,000	325,035	1,525,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	1,500,000	325,038	1,525,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	0	25,040	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	0	25,043	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	0	25,045	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	0	25,048	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	0	25,050	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000					1,500,000	620,092	577,978	2,698,070	

Orange backgrounds indicate hypothetical returns

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

Column Display Options [View RMD Checks](#) [View Income Riders](#) [Hide 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"/>
Insurance	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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"/>

**Incomes**

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**

Group	Title	Color
Group 1	Accounts	<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 2		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 3		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 4		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 5		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>

**Incomes**

Group	Title	Color
Group 1	Incomes	<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 2		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 3		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 4		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>
Group 5		<span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">Set</span>

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

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

Step 7: Structured Income Plan: The Death Benefit will be removed from the Insurance Column.

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: [View/Hide Death Benefit Function](#)

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Total Income	Year
	Savings/Checking	Income	Insurance	Income			Wages	SS		
net return	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
initial amount	25,000		0		0					
bonus % w/bonus	25,000	Manage	4.00 %	Manage	25,000		2.20 %	2.20 %		
end of 1	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
					0	1,500,000	1,500,000	620,092	577,978	2,698,070

Orange backgrounds indicate hypothetical returns

Step 8: Saving the Structured Income Planning Scenario: Click on 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: View/Hide Death Benefit Function

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 %		3.00 %	25,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor			
initial amount		25,000		0	25,000						
bonus % w/bonus		0.00 %		4.00 %	0						
		25,000	Manage	0	25,000		2.20 %	2.20 %			
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
					1,500,000		1,500,000	620,092	577,978	2,698,070	

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: View/Hide Death Benefit Function

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 %		3.00 %	25,000	Subtotal of account incomes	Infl Factor	Infl Factor			
initial amount		25,000		0	25,000						
bonus % w/bonus		0.00 %		4.00 %	0						
		25,000	Manage	0	25,000		2.20 %	2.20 %			
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
					1,500,000		1,500,000	620,092	577,978	2,698,070	

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.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, a 'PREPARED BY:' field is visible. The main header includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The title 'Structured Income Planning' is prominently displayed, with buttons for 'Edit', 'Save', 'Cancel', 'Add Account', 'Add Income', 'Add Inc Tax', 'Add Target', 'Edit or Add Scenario', and 'Display Options'. A dropdown menu for 'Scenario' is set to 'View/Hide Death Benefit Function'. The 'Planning Horizon' is set to '2 years'. The main data table is titled 'Accounts' and 'Incomes'. The 'Accounts' table has columns for 'Year', 'Account', 'Income', and 'Income'. The 'Incomes' table has columns for 'Accounts Total', 'Planned Distribution', 'Wages', 'SS', 'Total Income', and 'Year'. The table shows data for years 60 through 80. A red arrow points to the 'Cancel' button.

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
net return	60	0.01 %		3.00 %	25,000	Subtotal	Manage	Manage			
initial amount		25,000		0	25,000	of account	Infl Factor	Infl Factor			
bonus %		0.00 %		4.00 %	0	incomes	2.20 %	2.20 %			
w/bonus		25,000		0	25,000						
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000		1,500,000		620,092	577,978	2,698,070	

Orange backgrounds indicate hypothetical returns.

Step 11: Logout: To log out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

The screenshot shows the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below that, a 'PREPARED BY:' field is visible. The main header includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The title 'Structured Income Planning' is prominently displayed, with buttons for 'Edit' and 'Dynamic Mode'. A dropdown menu for 'Scenario' is set to 'View/Hide Death Benefit Function'. The 'Planning Horizon' is set to '20 years'. The main data table is titled 'Accounts' and 'Incomes'. The 'Accounts' table has columns for 'Year', 'Account', 'Income', and 'Income'. The 'Incomes' table has columns for 'Accounts Total', 'Planned Distribution', 'Wages', 'SS', 'Total Income', and 'Year'. The table shows data for years 60 through 80. A red arrow points to the 'SIGN OUT' button.

Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
net return	60	0.01 %		3.00 %	25,000	Subtotal	Manage	Manage			
initial amount		25,000		0	25,000	of account	Infl Factor	Infl Factor			
bonus %		0.00 %		4.00 %	0	incomes	2.20 %	2.20 %			
w/bonus		25,000		0	25,000						
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	250,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	253,300	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	256,673	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	260,119	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	130,530	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	131,202	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	131,888	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	132,590	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	133,307	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	134,039	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	134,788	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	135,554	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	136,336	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	137,135	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	137,952	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	38,787	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	39,640	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	40,512	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	41,404	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	42,315	end of 20
		0		1,500,000		1,500,000		620,092	577,978	2,698,070	

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).

