

# View Tax Rate Function

01/12/2026 11:19 am EST

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

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

The screenshot shows the 'Structured Income Planning' section of a financial planning software. A red arrow points to the 'Edit' button, which is highlighted in green. The interface includes a navigation bar at the top with links like 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar, there are tabs for 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The 'Structured Income Planning' tab is active, and the 'Edit' button is highlighted. The main content area displays a table with columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'Wages', 'SS', 'Approx Income Tax', 'After Tax Income', and 'Year'. The table shows data for a 20-year planning horizon, starting from year 60 and ending at year 80. The 'Accounts' section includes 'Savings/Checking' and 'Insurance' accounts. The 'Incomes' section includes 'Wages' and 'SS'. The 'Approx Income Tax' and 'After Tax Income' columns show the tax rate and the resulting income after taxes. The table is organized into sections: 'Accounts', 'Incomes', and 'Tax'. The 'Accounts' section shows the 'Accounts Total' and 'Planned Distribution' for each year. The 'Incomes' section shows the 'Wages' and 'SS' for each year. The 'Tax' section shows the 'Approx Income Tax' and 'After Tax Income' for each year. The table is organized into sections: 'Accounts', 'Incomes', and 'Tax'. The 'Accounts' section shows the 'Accounts Total' and 'Planned Distribution' for each year. The 'Incomes' section shows the 'Wages' and 'SS' for each year. The 'Tax' section shows the 'Approx Income Tax' and 'After Tax Income' for each year. The table is organized into sections: 'Accounts', 'Incomes', and 'Tax'. The 'Accounts' section shows the 'Accounts Total' and 'Planned Distribution' for each year. The 'Incomes' section shows the 'Wages' and 'SS' for each year. The 'Tax' section shows the 'Approx Income Tax' and 'After Tax Income' for each year.

Year	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year
60	0.01 %	3.00 %	25,000	25,000	150,000	0	(25,000)	225,000	end of 1
61	25,002	0	300,000	100,000	153,300	0	(25,330)	227,970	end of 2
62	25,005	0	300,000	100,000	156,673	0	(25,667)	231,005	end of 3
63	25,008	0	300,000	100,000	160,119	0	(26,012)	234,107	end of 4
64	25,010	0	300,000	100,000	0	30,530	(13,053)	117,477	end of 5
65	25,013	0	300,000	100,000	0	31,202	(13,120)	118,081	end of 6
66	25,015	0	300,000	100,000	0	31,888	(13,189)	118,699	end of 7
67	25,018	0	300,000	100,000	0	32,590	(13,259)	119,331	end of 8
68	25,020	0	300,000	100,000	0	33,307	(13,331)	119,976	end of 9
69	25,023	0	300,000	100,000	0	34,039	(13,404)	120,635	end of 10
70	25,025	0	300,000	100,000	0	34,788	(13,479)	121,309	end of 11
71	25,028	0	300,000	100,000	0	35,554	(13,555)	121,998	end of 12
72	25,030	0	300,000	100,000	0	36,336	(13,634)	122,702	end of 13
73	25,033	0	300,000	100,000	0	37,135	(13,714)	123,422	end of 14
74	25,035	0	300,000	100,000	0	37,952	(13,795)	124,157	end of 15
75	25,038	0	300,000	100,000	0	38,787	(3,879)	34,908	end of 16
76	25,040	0	0	25,040	0	39,640	(3,964)	35,676	end of 17
77	25,043	0	0	25,043	0	40,512	(4,051)	36,461	end of 18
78	25,045	0	0	25,045	0	41,404	(4,140)	37,263	end of 19
79	25,048	0	0	25,048	0	42,315	(4,231)	38,083	end of 20
80	25,050	0	0	25,050	0				
0			1,500,000	1,500,000	620,092	577,978	(269,807)	2,428,263	

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

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 Tax Rate

Planning Horizon: 20 years

Accounts

Savings/Checking

Insurance

Incomes

Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage Infi Factor	Manage Infi Factor	Manage		
initial amount		25,000		0		25,000		2.20 %	2.20 %			
bonus %		0.00 %		4.00 %								
w/bonus		25,000	Manage	0	Manage							
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	(25,000)	225,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4
end of 5	65	25,013	0	300,000	100,000	325,013	100,000	0	30,530	(13,053)	117,477	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	(13,189)	118,699	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	(13,259)	119,331	end of 8
end of 9	69	25,023	0	300,000	100,000	325,023	100,000	0	33,307	(13,331)	119,976	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	(13,404)	120,635	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	(13,479)	121,309	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	(13,555)	121,998	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	(13,634)	122,702	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	(13,714)	123,422	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	(4,051)	36,461	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	(4,140)	37,263	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	(4,231)	38,083	end of 20
		0				1,500,000	1,500,000	620,092	577,978	(269,807)	2,428,263	

Orange backgrounds indicate hypothetical returns

Step 3: View Tax Rates: Click on the green View Tax Rates button located in 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

Accounts

Group 1

Group 2

Group 3

Group 4

Group 5

Savings/Checking

Insurance

Wages

SS

Incomes

Group 1

Group 2

Group 3

Group 4

Group 5

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

Set

Group 2

Set

Group 3

Set

Group 4

Set

Group 5

Set

Incomes

Title

Color

Group 1

Incomes

Set

Group 2

Set

Group 3

Set

Group 4

Set

Group 5

Set

Reset Title / Colors

Copy Setup To All Scenarios

Return With Grouping

Return Without Grouping

Step 4: Structured Income Planning Page: The Approx Income Tax column will display the percentage amount.

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 Tax Rate

Planning Horizon

20 years

Accounts

Savings/Checking

Insurance

Incomes

Wages

SS

Approx Income Tax

After Tax Income

Year

Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage	Manage	Manage		
initial amount		25,000		0		0		Infl Factor	Infl Factor	Eff Tax Rate		
bonus %		0.00 %		4.00 %		0						
w/bonus		25,000	Manage	0	Manage	25,000		2.20 %	2.20 %			
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	(25,000)-10%	225,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)-10%	227,970	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)-10%	231,005	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)-10%	234,107	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	(13,053)-10%	117,477	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)-10%	118,081	end of 6
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	(13,189)-10%	118,699	end of 7
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	(13,259)-10%	119,331	end of 8
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	(13,331)-10%	119,976	end of 9
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	(13,404)-10%	120,635	end of 10
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	(13,479)-10%	121,309	end of 11
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	(13,555)-10%	121,998	end of 12
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	(13,634)-10%	122,702	end of 13
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	(13,714)-10%	123,422	end of 14
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)-10%	124,157	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	(3,879)-10%	34,908	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	(3,964)-10%	35,676	end of 17
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	(4,051)-10%	36,461	end of 18
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	(4,140)-10%	37,263	end of 19
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	(4,231)-10%	38,083	end of 20
		0				1,500,000	1,500,000	620,092	577,978	(269,807)	2,428,263	

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:  
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 Tax Rate

		Accounts						Incomes						
		Savings/Checking		Insurance										
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year		
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage	Manage	Manage				
initial amount		25,000		0		0		Infl Factor	Infl Factor	Eff Tax Rate				
bonus % w/bonus		0.00 %		4.00 %		0								
		25,000	Manage	0	Manage	25,000		2.20 %	2.20 %					
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	(25,000)-10%	225,000	end of 1		
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)-10%	227,970	end of 2		
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)-10%	231,005	end of 3		
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)-10%	234,107	end of 4		
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	(13,053)-10%	117,477	end of 5		
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)-10%	118,081	end of 6		
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	(13,189)-10%	118,699	end of 7		
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	(13,259)-10%	119,331	end of 8		
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	(13,331)-10%	119,976	end of 9		
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	(13,404)-10%	120,635	end of 10		
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	(13,479)-10%	121,309	end of 11		
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	(13,555)-10%	121,998	end of 12		
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	(13,634)-10%	122,702	end of 13		
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	(13,714)-10%	123,422	end of 14		
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)-10%	124,157	end of 15		
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	(3,879)-10%	34,908	end of 16		
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	(3,964)-10%	35,676	end of 17		
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	(4,051)-10%	36,461	end of 18		
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	(4,140)-10%	37,263	end of 19		
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	(4,231)-10%	38,083	end of 20		
		0				1,500,000	1,500,000	620,092	577,978	(269,807)	2,428,263			

Orange backgrounds indicate hypothetical returns

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

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

Account and Income Grouping

Accounts
Group 1
Group 2
Group 3
Group 4
Group 5

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

Incomes

Reset Title / Colors
Copy Setup To All Scenarios

Return With Grouping
Return Without Grouping

Step 7: Structured Income Planning Page: The percentage amount will be removed from the Approx Income Tax 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

Structured Income Planning

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

Scenario
View/Hide Tax Rate

Planning Horizon
20 years

Accounts

Incomes

Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor	Manage		
initial amount		25,000		0		25,000		2.20 %	2.20 %			
bonus % w/bonus		0.00 %		4.00 %								
		25,000	Manage	0	Manage							
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	(25,000)	225,000	end of 1
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	(13,053)	117,477	end of 5
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6
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end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17
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end of 20	80	25,050	0	0	0	25,050	0	0	42,315	(4,231)	38,083	end of 20
		0				1,500,000	1,500,000	620,092	577,978	(269,807)	2,428,263	

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:  
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 Tax Rate

Planning Horizon: 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Approx Income Tax	After Tax Income	Year
	Account	Income	Account	Income			Wages	SS			
net return	60	0.01 %		3.00 %							
initial amount		25,000		0	25,000	Subtotal of account incomes	Manage	Manage	Manage		
bonus % w/bonus		0.00 %		4.00 %	25,000		Infl Factor 2.20 %	Infl Factor 2.20 %			
end of 1	61	25,002	0	300,000	325,002	100,000	150,000	0	(25,000)	225,000	end of 1
end of 2	62	25,005	0	300,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2
end of 3	63	25,008	0	300,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3
end of 4	64	25,010	0	300,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4
end of 5	65	25,013	0	300,000	325,012	100,000	0	30,530	(13,053)	117,477	end of 5
end of 6	66	25,015	0	300,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6
end of 7	67	25,018	0	300,000	325,018	100,000	0	31,888	(13,189)	118,699	end of 7
end of 8	68	25,020	0	300,000	325,020	100,000	0	32,590	(13,259)	119,331	end of 8
end of 9	69	25,023	0	300,000	325,022	100,000	0	33,307	(13,331)	119,976	end of 9
end of 10	70	25,025	0	300,000	325,025	100,000	0	34,039	(13,404)	120,635	end of 10
end of 11	71	25,028	0	300,000	325,028	100,000	0	34,788	(13,479)	121,309	end of 11
end of 12	72	25,030	0	300,000	325,030	100,000	0	35,554	(13,555)	121,998	end of 12
end of 13	73	25,033	0	300,000	325,033	100,000	0	36,336	(13,634)	122,702	end of 13
end of 14	74	25,035	0	300,000	325,035	100,000	0	37,135	(13,714)	123,422	end of 14
end of 15	75	25,038	0	300,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15
end of 16	76	25,040	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16
end of 17	77	25,043	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17
end of 18	78	25,045	0	0	25,045	0	0	40,512	(4,051)	36,461	end of 18
end of 19	79	25,048	0	0	25,048	0	0	41,404	(4,140)	37,263	end of 19
end of 20	80	25,050	0	0	25,050	0	0	42,315	(4,231)	38,083	end of 20
		0		1,500,000		1,500,000	620,092	577,978	(269,807)	2,428,263	

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:  
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](#) [Dynamic Mode](#)

Scenario: View/Hide Tax Rate

Planning Horizon: 20 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Approx Income Tax	After Tax Income	Year
	Account	Income	Account	Income			Wages	SS			
net return	60	0.01 %		3.00 %							
initial amount		25,000		0	25,000	Subtotal of account incomes	Infl Factor 2.20 %	Infl Factor 2.20 %			
bonus % w/bonus		0.00 %		4.00 %	25,000						
end of 1	61	25,002	0	300,000	325,002	100,000	150,000	0	(25,000)	225,000	end of 1
end of 2	62	25,005	0	300,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2
end of 3	63	25,008	0	300,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3
end of 4	64	25,010	0	300,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4
end of 5	65	25,013	0	300,000	325,012	100,000	0	30,530	(13,053)	117,477	end of 5
end of 6	66	25,015	0	300,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6
end of 7	67	25,018	0	300,000	325,018	100,000	0	31,888	(13,189)	118,699	end of 7
end of 8	68	25,020	0	300,000	325,020	100,000	0	32,590	(13,259)	119,331	end of 8
end of 9	69	25,023	0	300,000	325,022	100,000	0	33,307	(13,331)	119,976	end of 9
end of 10	70	25,025	0	300,000	325,025	100,000	0	34,039	(13,404)	120,635	end of 10
end of 11	71	25,028	0	300,000	325,028	100,000	0	34,788	(13,479)	121,309	end of 11
end of 12	72	25,030	0	300,000	325,030	100,000	0	35,554	(13,555)	121,998	end of 12
end of 13	73	25,033	0	300,000	325,033	100,000	0	36,336	(13,634)	122,702	end of 13
end of 14	74	25,035	0	300,000	325,035	100,000	0	37,135	(13,714)	123,422	end of 14
end of 15	75	25,038	0	300,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15
end of 16	76	25,040	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16
end of 17	77	25,043	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17
end of 18	78	25,045	0	0	25,045	0	0	40,512	(4,051)	36,461	end of 18
end of 19	79	25,048	0	0	25,048	0	0	41,404	(4,140)	37,263	end of 19
end of 20	80	25,050	0	0	25,050	0	0	42,315	(4,231)	38,083	end of 20
		0		1,500,000		1,500,000	620,092	577,978	(269,807)	2,428,263	

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:  
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## Structured Income Planning

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

Scenario:

Planning Horizon:

		Accounts						Incomes						
		Savings/Checking		Insurance										
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year		
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Manage	Manage	Manage				
initial amount		25,000	0	4.00 %	0	0	Infl Factor	Infl Factor						
bonus % w/bonus		25,000	0	0	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	(25,000)	225,000	end of 1		
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2		
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3		
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4		
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	(13,053)	117,477	end of 5		
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6		
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	(13,189)	118,699	end of 7		
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	(13,259)	119,331	end of 8		
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	(13,331)	119,976	end of 9		
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	(13,404)	120,635	end of 10		
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	(13,479)	121,309	end of 11		
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	(13,555)	121,998	end of 12		
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	(13,634)	122,702	end of 13		
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	(13,714)	123,422	end of 14		
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15		
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16		
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17		
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	(4,051)	36,461	end of 18		
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	(4,140)	37,263	end of 19		
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	(4,231)	38,083	end of 20		
		0		1,500,000		1,500,000		620,092	577,978	(269,807)	2,428,263			

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:  
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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:

		Accounts						Incomes						
		Savings/Checking		Insurance										
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Approx Income Tax	After Tax Income	Year		
net return	60	0.01 %		3.00 %		25,000	Subtotal of account incomes	Infl Factor	Infl Factor					
initial amount		25,000	0	4.00 %	0	0	2.20 %	2.20 %						
bonus % w/bonus		25,000	0	0	0	25,000								
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	150,000	0	(25,000)	225,000	end of 1		
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2		
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3		
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4		
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	0	30,530	(13,053)	117,477	end of 5		
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6		
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	0	31,888	(13,189)	118,699	end of 7		
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	0	32,590	(13,259)	119,331	end of 8		
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	0	33,307	(13,331)	119,976	end of 9		
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	0	34,039	(13,404)	120,635	end of 10		
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	0	34,788	(13,479)	121,309	end of 11		
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	0	35,554	(13,555)	121,998	end of 12		
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	0	36,336	(13,634)	122,702	end of 13		
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	0	37,135	(13,714)	123,422	end of 14		
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15		
end of 16	76	25,040	0	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16		
end of 17	77	25,043	0	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17		
end of 18	78	25,045	0	0	0	25,045	0	0	40,512	(4,051)	36,461	end of 18		
end of 19	79	25,048	0	0	0	25,048	0	0	41,404	(4,140)	37,263	end of 19		
end of 20	80	25,050	0	0	0	25,050	0	0	42,315	(4,231)	38,083	end of 20		
		0		1,500,000		1,500,000		620,092	577,978	(269,807)	2,428,263			

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: [support@planscout.com](mailto:support@planscout.com).

