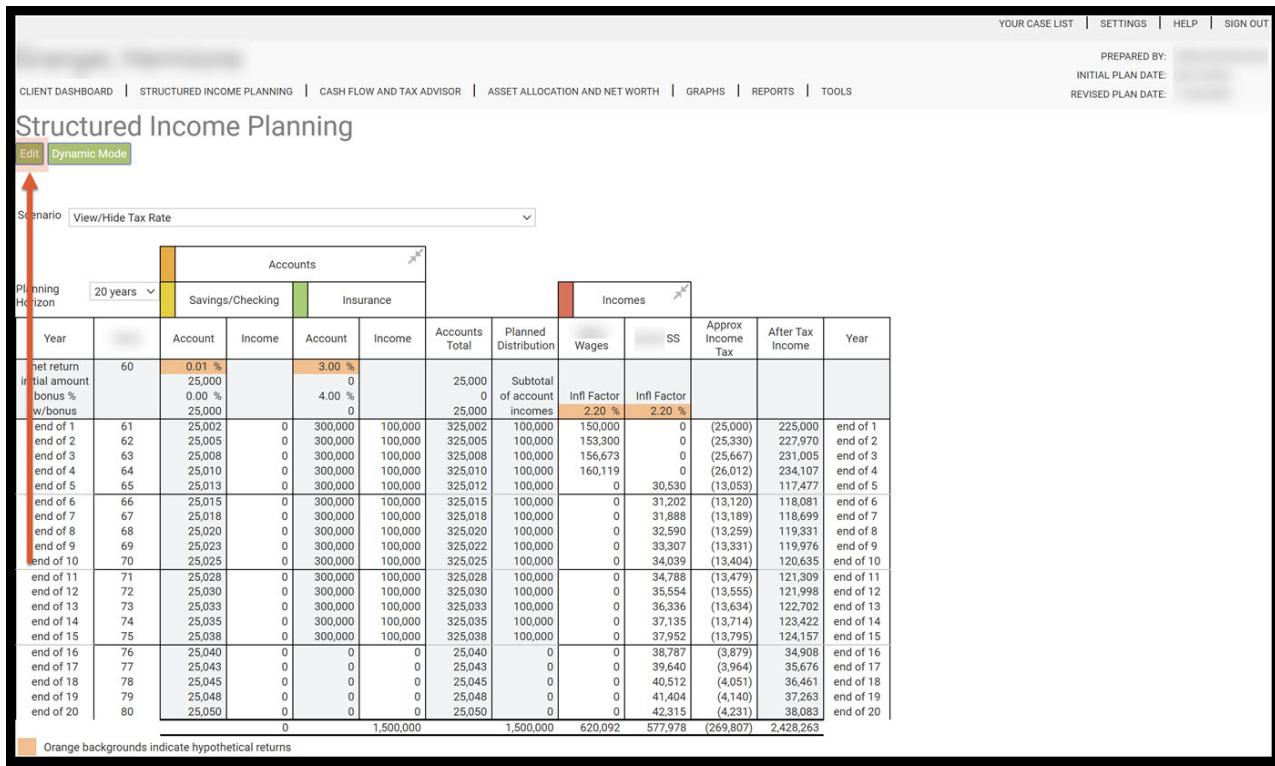


# View Tax Rate Function

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 software 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 buttons for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. Below these, the 'Structured Income Planning' sub-heading is displayed with 'Edit' and 'Dynamic Mode' buttons. An orange arrow points to the 'Edit' button. The main area is a data grid titled 'Accounts' with columns for 'Year', 'Account', 'Income', 'Planned Distribution', 'Incomes', 'Approx Income Tax', and 'After Tax Income'. The grid shows a timeline from year 60 to 80, with various account balances and income amounts. A legend at the bottom left indicates that orange backgrounds represent hypothetical returns.

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

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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 Tax Rate

Planning Horizon		Accounts		Incomes		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 %								
initial amount		25,000		0		25,000	Subtotal of account incomes	Manage Infl Factor 2.20 %				
bonus % w/bonus		0.00 %		4.00 %		0	25,000	Manage Infl Factor 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	
					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		Incomes				
Savings/Checking	Insurance	Group 1	Group 2	Group 3	Group 4	Group 5
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Accounts 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.						
<input type="button" value="Reset"/> <input type="button" value="Condense All"/> <input type="button" value="Uncondense All"/>						

Group Setup

Accounts		Incomes							
Group 1	Group 2	Group 3	Group 4	Group 5	Group 1	Group 2	Group 3	Group 4	Group 5
Accounts					Incomes				
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>							
<input type="button" value="Reset Title / Colors"/> <input type="button" value="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

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

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 %	0	25,000	Subtotal of account incomes	150,000	2.20 %	0 (25,000)-10%	225,000	
initial amount		25,000	0	4.00 %	0		153,300	0 (25,330)-10%	227,970		
bonus % w/bonus		0.00 %	4.00 %	0	25,000		156,673	0 (25,667)-10%	231,005		
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	0 (26,012)-10%	234,107	end of 1	
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	0 (26,015)-10%	234,107	end of 2	
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	0 (26,018)-10%	234,107	end of 3	
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	0 (26,021)-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%	120,655	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%	121,999	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

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

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 %	0	25,000	Subtotal of account incomes	150,000	2.20 %	0 (25,000)-10%	225,000	
initial amount		25,000	0	4.00 %	0		153,300	0 (25,330)-10%	227,970		
bonus % w/bonus		0.00 %	4.00 %	0	25,000		156,673	0 (25,667)-10%	231,005		
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	0 (26,012)-10%	234,107	end of 1	
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	0 (26,015)-10%	234,107	end of 2	
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	0 (26,018)-10%	234,107	end of 3	
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	0 (26,021)-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%	120,655	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%	121,999	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						Group Setup					
		Accounts					Incomes				
		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"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Insurance		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>							
Incomes											
Wages		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
SS		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

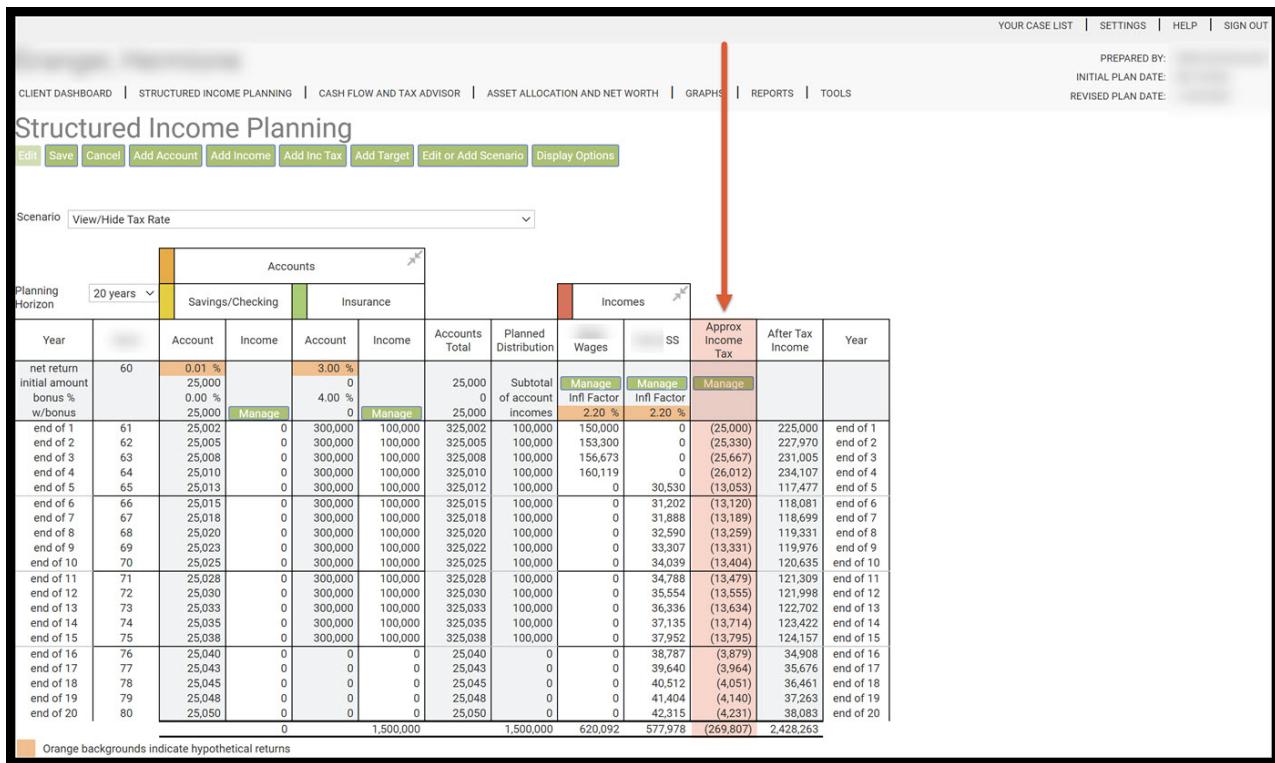
Account or income groups must be created in the sequential order from left to right as they appear in the Income Plan. You may have to re-order accounts using the Edit Scenario function to achieve the sequence you want for your account/income groups. Reordering or adding accounts or incomes on the Edit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

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

[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

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

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

Scenario		View/Hide Tax Rate		Structured Income Planning															
				Accounts				Incomes				Approx Income Tax				After Tax Income		Year	
Planning Horizon		20 years		Savings/Checking		Insurance		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	150,000	0	(25,000)	225,000								
initial amount		25,000		0		0		0		0	227,970								
bonus % w/bonus		0.00 %		4.00 %		25,000		153,300	0	(25,330)	231,005								
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	150,000	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	(13,321)	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 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

		Accounts		Incomes				
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	
net return	60	0.01 %		3.00 %	0	25,000	Subtotal of account incomes	
initial amount		25,000		0	0	0	Manage	
bonus %		0.00 %		4.00 %	0	0	Infl Factor	
w/bonus		25,000		0	0	0	Infl Factor	
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	Wages
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	SS
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	
end of 16	76	25,040	0	0	0	25,040	0	
end of 17	77	25,043	0	0	0	25,043	0	
end of 18	78	25,045	0	0	0	25,045	0	
end of 19	79	25,048	0	0	0	25,048	0	
end of 20	80	25,050	0	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 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

		Accounts		Incomes				
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	
net return	60	0.01 %		3.00 %	0	25,000	Subtotal of account incomes	
initial amount		25,000		0	0	0	Manage	
bonus %		0.00 %		4.00 %	0	0	Infl Factor	
w/bonus		25,000		0	0	0	Infl Factor	
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	Wages
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	SS
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	
end of 16	76	25,040	0	0	0	25,040	0	
end of 17	77	25,043	0	0	0	25,043	0	
end of 18	78	25,045	0	0	0	25,045	0	
end of 19	79	25,048	0	0	0	25,048	0	
end of 20	80	25,050	0	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 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:  
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/Edit Tax Rate](#)

Planning Horizon: 2 years

Year	Accounts					Incomes					Approx Income Tax	After Tax Income	Year
	Savings/Checking		Insurance			Accounts Total	Planned Distribution	Wages	SS				
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 %									
initial amount	25,000		0		25,000								
bonus % w/bonus	0.00 %		4.00 %		25,000								
	25,000	<a href="#">Manage</a>	0	<a href="#">Manage</a>	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	160,530	0	(30,530)	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:  
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	Accounts			Incomes	Approx Income Tax	After Tax Income	Year		
		Savings/Checking		Insurance						
		Year	Account	Income						
net return	60	0.01 %	3.00 %							
initial amount	25,000		0	25,000						
bonus % w/bonus	0.00 %		4.00 %	0						
	25,000			25,000						
end of 1	61	25,002	0	300,000	100,000	325,002	100,000	225,000		
end of 2	62	25,005	0	300,000	100,000	325,005	100,000	227,970		
end of 3	63	25,008	0	300,000	100,000	325,008	100,000	231,005		
end of 4	64	25,010	0	300,000	100,000	325,010	100,000	234,107		
end of 5	65	25,013	0	300,000	100,000	325,012	100,000	237,209		
end of 6	66	25,015	0	300,000	100,000	325,015	100,000	240,302		
end of 7	67	25,018	0	300,000	100,000	325,018	100,000	243,499		
end of 8	68	25,020	0	300,000	100,000	325,020	100,000	246,696		
end of 9	69	25,023	0	300,000	100,000	325,022	100,000	249,893		
end of 10	70	25,025	0	300,000	100,000	325,025	100,000	253,089		
end of 11	71	25,028	0	300,000	100,000	325,028	100,000	256,285		
end of 12	72	25,030	0	300,000	100,000	325,030	100,000	259,482		
end of 13	73	25,033	0	300,000	100,000	325,033	100,000	262,679		
end of 14	74	25,035	0	300,000	100,000	325,035	100,000	265,876		
end of 15	75	25,038	0	300,000	100,000	325,038	100,000	269,073		
end of 16	76	25,040	0	0	0	25,040	0	20,635		
end of 17	77	25,043	0	0	0	25,043	0	20,832		
end of 18	78	25,045	0	0	0	25,045	0	21,029		
end of 19	79	25,048	0	0	0	25,048	0	21,226		
end of 20	80	25,050	0	0	0	25,050	0	21,413		
				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).

