

View Tax Rate Function

11/08/2024 12:52 pm 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' 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 'Scenario' dropdown is set to 'View/Hide Tax Rate'. The 'Planning Horizon' is set to '20 years'. The table below shows account and income details over 20 years.

Year	Accounts		Incomes		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					
bonus % w/bonus		0.00 %		4.00 %	25,000	Infl Factor	Infl Factor				
		25,000		0		2.20 %	2.20 %				
end of 1	61	25,002	0	300,000	100,000	150,000	0	(25,000)	225,000	end of 1	
end of 2	62	25,005	0	300,000	100,000	153,300	0	(25,330)	227,970	end of 2	
end of 3	63	25,008	0	300,000	100,000	156,673	0	(25,667)	231,005	end of 3	
end of 4	64	25,010	0	300,000	100,000	160,119	0	(26,012)	234,107	end of 4	
end of 5	65	25,013	0	300,000	100,000	163,647	0	(26,353)	237,274	end of 5	
end of 6	66	25,015	0	300,000	100,000	167,257	30,530	(13,053)	117,477	end of 6	
end of 7	67	25,018	0	300,000	100,000	170,950	0	(13,120)	118,081	end of 7	
end of 8	68	25,020	0	300,000	100,000	174,727	0	(13,189)	118,699	end of 8	
end of 9	69	25,023	0	300,000	100,000	178,589	0	(13,259)	119,331	end of 9	
end of 10	70	25,025	0	300,000	100,000	182,537	0	(13,331)	119,976	end of 10	
end of 11	71	25,028	0	300,000	100,000	186,572	0	(13,404)	120,635	end of 11	
end of 12	72	25,030	0	300,000	100,000	190,694	0	(13,479)	121,309	end of 12	
end of 13	73	25,033	0	300,000	100,000	194,904	0	(13,555)	121,998	end of 13	
end of 14	74	25,035	0	300,000	100,000	199,203	0	(13,634)	122,702	end of 14	
end of 15	75	25,038	0	300,000	100,000	203,592	0	(13,714)	123,422	end of 15	
end of 16	76	25,040	0	0	0	25,040	0	(13,795)	124,157	end of 16	
end of 17	77	25,043	0	0	0	25,043	0	(3,879)	34,908	end of 17	
end of 18	78	25,045	0	0	0	25,045	0	(3,964)	35,676	end of 18	
end of 19	79	25,048	0	0	0	25,048	0	(4,051)	36,461	end of 19	
end of 20	80	25,050	0	0	0	25,050	0	(4,140)	37,263	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 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 Tax Rate

Planning Horizon: 20 years

Year	Account	Accounts		Accounts Total	Planned Distribution	Incomes		Approx Income Tax	After Tax Income	Year
		Savings/Checking	Insurance			Wages	SS			
net return	0.01 %		3.00 %	25,000	Subtotal of account incomes	Manage	Manage			
initial amount	25,000		0	0		Infl Factor	Infl Factor			
bonus %	0.00 %		4.00 %	25,000		2.20 %	2.20 %			
w/bonus	25,000	Manage	Manage							
end of 1	61	25,002	0	300,000	100,000	150,000	0	(25,000)	225,000	end of 1
end of 2	62	25,005	0	300,000	100,000	153,300	0	(25,330)	227,970	end of 2
end of 3	63	25,008	0	300,000	100,000	156,673	0	(25,667)	231,005	end of 3
end of 4	64	25,010	0	300,000	100,000	160,119	0	(25,912)	234,107	end of 4
end of 5	65	25,013	0	300,000	100,000	163,630	30,530	(13,053)	117,477	end of 5
end of 6	66	25,015	0	300,000	100,000	167,202	31,202	(13,120)	118,081	end of 6
end of 7	67	25,018	0	300,000	100,000	170,838	31,888	(13,189)	118,699	end of 7
end of 8	68	25,020	0	300,000	100,000	174,539	32,590	(13,259)	119,331	end of 8
end of 9	69	25,023	0	300,000	100,000	178,297	33,307	(13,331)	119,976	end of 9
end of 10	70	25,025	0	300,000	100,000	182,112	34,039	(13,404)	120,635	end of 10
end of 11	71	25,028	0	300,000	100,000	185,984	34,788	(13,479)	121,309	end of 11
end of 12	72	25,030	0	300,000	100,000	190,000	35,554	(13,555)	121,998	end of 12
end of 13	73	25,033	0	300,000	100,000	194,163	36,336	(13,634)	122,702	end of 13
end of 14	74	25,035	0	300,000	100,000	198,475	37,135	(13,714)	123,422	end of 14
end of 15	75	25,038	0	300,000	100,000	202,936	37,952	(13,795)	124,157	end of 15
end of 16	76	25,040	0	0	0	25,040	0	(3,879)	34,908	end of 16
end of 17	77	25,043	0	0	0	25,043	0	(3,964)	35,676	end of 17
end of 18	78	25,045	0	0	0	25,045	0	(4,051)	36,461	end of 18
end of 19	79	25,048	0	0	0	25,048	0	(4,140)	37,263	end of 19
end of 20	80	25,050	0	0	0	25,050	0	(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	<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"/>

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

Group	Title	Color
Group 1	Accounts	Set
Group 2		Set
Group 3		Set
Group 4		Set
Group 5		Set

Incomes

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

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

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

Group Setup

Accounts

Group	Title	Color
Group 1	Accounts	Set
Group 2		Set
Group 3		Set
Group 4		Set
Group 5		Set

Incomes

Group	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](#)

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

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](#)

Year	Accounts				Accounts Total	Planned Distribution	Incomes		Approx Income Tax	After Tax Income	Year
	Account	Income	Account	Income			Wages	SS			
net return	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 %								
end of 1	25,002	0	300,000	100,000	325,002	100,000	150,000	0	(25,000)	225,000	end of 1
end of 2	25,005	0	300,000	100,000	325,005	100,000	153,300	0	(25,330)	227,970	end of 2
end of 3	25,008	0	300,000	100,000	325,008	100,000	156,673	0	(25,667)	231,005	end of 3
end of 4	25,010	0	300,000	100,000	325,010	100,000	160,119	0	(26,012)	234,107	end of 4
end of 5	25,013	0	300,000	100,000	325,012	100,000	0	30,530	(13,053)	117,477	end of 5
end of 6	25,015	0	300,000	100,000	325,015	100,000	0	31,202	(13,120)	118,081	end of 6
end of 7	25,018	0	300,000	100,000	325,018	100,000	0	31,888	(13,189)	118,699	end of 7
end of 8	25,020	0	300,000	100,000	325,020	100,000	0	32,590	(13,259)	119,331	end of 8
end of 9	25,023	0	300,000	100,000	325,022	100,000	0	33,307	(13,331)	119,976	end of 9
end of 10	25,025	0	300,000	100,000	325,025	100,000	0	34,039	(13,404)	120,635	end of 10
end of 11	25,028	0	300,000	100,000	325,028	100,000	0	34,788	(13,479)	121,309	end of 11
end of 12	25,030	0	300,000	100,000	325,030	100,000	0	35,554	(13,555)	121,998	end of 12
end of 13	25,033	0	300,000	100,000	325,033	100,000	0	36,336	(13,634)	122,702	end of 13
end of 14	25,035	0	300,000	100,000	325,035	100,000	0	37,135	(13,714)	123,422	end of 14
end of 15	25,038	0	300,000	100,000	325,038	100,000	0	37,952	(13,795)	124,157	end of 15
end of 16	25,040	0	0	0	25,040	0	0	38,787	(3,879)	34,908	end of 16
end of 17	25,043	0	0	0	25,043	0	0	39,640	(3,964)	35,676	end of 17
end of 18	25,045	0	0	0	25,045	0	0	40,512	(4,051)	36,461	end of 18
end of 19	25,048	0	0	0	25,048	0	0	41,404	(4,140)	37,263	end of 19
end of 20	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 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 %	0		Infl Factor	Infl Factor						
		25,000		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 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	Manage	Manage	Manage					
bonus % w/bonus		0.00 %		4.00 %	0		Infl Factor	Infl Factor						
		25,000		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 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:
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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 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 2.20 %	Manage 2.20 %	Manage			
bonus % w/bonus		0.00 %		4.00 %	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	(25,300)	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 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	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	(25,300)	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: +1-888-449-6917 or support@planscout.com.

