

Adding a Pension into the Structured Income Plan to An Existing Plan

01/09/2026 11:33 am EST

From the Client Dashboard within the Income page there is a way to add a pension into the structured income plan to an existing plan. Below are the step-by-step guidelines for a pension from the Incomes page.

Step 1: Edit: Click on the green edit button underneath the Incomes heading.

The screenshot shows the 'Incomes' page in a financial planning software. The page has a navigation bar at the top with links like 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. Below the navigation bar, the 'Incomes' heading is visible, followed by a green 'Edit' button and a 'Goto Assets >>' button. A red arrow points to the 'Edit' button. The main content area displays various income sources: Wages/Income, Social security, and Pensions. Each section has fields for 'Current income (if still working)', 'Expected wage increase while working %', 'Projected benefits', 'At age', 'Yearly amount', 'OR Current benefit if already retired', and 'Expected COLA increase %'. The 'Wages/Income' section shows a current income of \$175,000 and an expected wage increase of 2.2%. The 'Social security' section shows projected benefits of \$25,200 at age 62, \$36,000 at age 67, and \$44,640 at age 70, with an expected COLA increase of 2.5%. The 'Pensions' section shows projected benefits of 0 at age 0, with an expected COLA increase of 0.0%.

Step 2: At Age Text Box: Enter in the age the projected benefits would start.

The screenshot shows the 'Incomes' page with the 'Edit' button highlighted. The 'At age' text box for the 'Pensions' section is highlighted with a red arrow. The 'At age' text box is currently set to 0. The 'Yearly amount' text box is also highlighted with a red arrow. The 'Expected COLA increase %' text box is currently set to 0.0. The 'Projected benefits' text box is currently set to 0. The 'OR Current benefit if already retired' text box is currently set to 0.0. The 'Expected COLA increase %' text box is currently set to 0.0. The 'Projected benefits' text box is currently set to 0. The 'OR Current benefit if already retired' text box is currently set to 0.0. The 'Expected COLA increase %' text box is currently set to 0.0.

Step 3: Yearly Amount Text Box: Enter in the yearly numeric amount of the pension.

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Incomes

[Edit](#) [Save](#) [Cancel](#)

☐ Enter monthly amounts ☒ Enter yearly amounts

| Wages/Income | Current income (if still working) | Yearly amount | Wages/Income | Current income (if still working) | Yearly amount |
|--|-----------------------------------|---------------|--|-----------------------------------|---------------|
| | | \$175,000 | | | |
| Expected wage increase while working % | | 2.2 | Expected wage increase while working % | | 0.0 |

| Social security | At age | Yearly amount | Social security | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|---------|---------------|
| | 62 | \$25,200 | | 62 | |
| Projected benefits | 67 | \$36,000 | Projected benefits | unknown | |
| | 70 | \$44,640 | | 70 | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 2.5 | Expected COLA increase % | | 0.0 |

| Pensions | At age | Yearly amount | Pensions | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|--------|---------------|
| | 65 | | | | |
| Projected benefits | | | Projected benefits | | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 0.0 | Expected COLA increase % | | 0.0 |

Step 4: Expected COLA Increase %: Enter in the numeric percentage amount.

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Incomes

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☐ Enter monthly amounts ☒ Enter yearly amounts

| Wages/Income | Current income (if still working) | Yearly amount | Wages/Income | Current income (if still working) | Yearly amount |
|--|-----------------------------------|---------------|--|-----------------------------------|---------------|
| | | \$175,000 | | | |
| Expected wage increase while working % | | 2.2 | Expected wage increase while working % | | 0.0 |

| Social security | At age | Yearly amount | Social security | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|---------|---------------|
| | 62 | \$25,200 | | 62 | |
| Projected benefits | 67 | \$36,000 | Projected benefits | unknown | |
| | 70 | \$44,640 | | 70 | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 2.5 | Expected COLA increase % | | 0.0 |

| Pensions | At age | Yearly amount | Pensions | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|--------|---------------|
| | 65 | 48,000 | | 0 | |
| Projected benefits | | | Projected benefits | | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 0.0 | Expected COLA increase % | | 0.0 |

Step 5: Save: Click on the green Save button underneath the Incomes Heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Incomes

[Edit](#) [Save](#) [Cancel](#)

☐ Enter monthly amounts ☒ Enter yearly amounts

| Wages/Income | Current income (if still working) | Yearly amount | Wages/Income | Current income (if still working) | Yearly amount |
|--|-----------------------------------|---------------|--|-----------------------------------|---------------|
| | | \$175,000 | | | |
| Expected wage increase while working % | | 2.2 | Expected wage increase while working % | | 0.0 |

| Social security | At age | Yearly amount | Social security | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|---------|---------------|
| | 62 | \$25,200 | | 62 | |
| Projected benefits | 67 | \$36,000 | Projected benefits | unknown | |
| | 70 | \$44,640 | | 70 | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 2.5 | Expected COLA increase % | | 0.0 |

| Pensions | At age | Yearly amount | Pensions | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|--------|---------------|
| | 65 | 48,000 | | 0 | |
| Projected benefits | | | Projected benefits | | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 2.5 | Expected COLA increase % | | 0.0 |

Step 6: GoTo Assets: Click on the green GoTo Assets underneath the Incomes headings.

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Incomes

[Edit](#) [GoTo Assets >>](#)

| Wages/Income | Current income (if still working) | Yearly amount | Wages/Income | Current income (if still working) | Yearly amount |
|--|-----------------------------------|---------------|--|-----------------------------------|---------------|
| Expected wage increase while working % | | \$175,000 | Expected wage increase while working % | | 0.0 |
| | | 2.2 | | | |

| Social security | At age | Yearly amount | Social security | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|---------|---------------|
| Projected benefits | 62 | \$25,200 | Projected benefits | 62 | |
| | 67 | \$36,000 | | unknown | |
| | 70 | \$44,640 | | 70 | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 2.5 | Expected COLA increase % | | 0.0 |

| Pensions | At age | Yearly amount | Pensions | At age | Yearly amount |
|---------------------------------------|--------|---------------|---------------------------------------|--------|---------------|
| Projected benefits | 65 | \$48,000 | Projected benefits | 0 | |
| OR Current benefit if already retired | | | OR Current benefit if already retired | | |
| Expected COLA increase % | | 2.5 | Expected COLA increase % | | 0.0 |

Step 7: Create Planning Scenario: Click on the green Create Planning Scenario underneath the Assets heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Assets

[Edit](#) [Create Planning Scenario](#)

Current Monetary Assets

| Description | Owner | Tax Qualification | Risk Level | Allocation | Return | Balance |
|---------------------------|-------|-------------------|------------|--------------|--------|-------------|
| Checkings/Savings Account | | NQ | Cons | Conservative | 0.01 | \$240,000 |
| Individual Roth IRA | | ROTH | Mod | Moderate | 0.0 | \$1,750,000 |

Property List (homes, rentals, land)

Other Assets & Liabilities (boats, RV, collectibles)

Orange backgrounds indicate hypothetical returns

Step 8: Structured Income Planning Page: A new column as automatically appeared in the structured income plan title pension.

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: New Scenario (3)

Planning Horizon: 16 years | Checkings/Savings Account (4) | Individual Roth IRA (4)

| Year | | Account | Income | Account | Income | Accounts Total | Planned Distribution | Wages (5) | SS (5) | Pension (4) | Total Income | Year |
|----------------|----|---------|--------|-----------|--------|----------------|----------------------|-----------|---------|-------------|--------------|-----------|
| net return | 60 | 0.01 % | | 0.00 % | | 1,990,000 | | | | | | |
| initial amount | | 240,000 | | 1,750,000 | | 1,990,000 | | | | | | |
| bonus % | | 0.00 % | | 0.00 % | | 0 | | | | | | |
| w/bonus | | 240,000 | | 1,750,000 | | 1,990,000 | | | | | | |
| end of 1 | 61 | 240,024 | 0 | 1,750,000 | 0 | 1,990,024 | | 175,000 | 0 | 0 | 175,000 | end of 1 |
| end of 2 | 62 | 240,048 | 0 | 1,750,000 | 0 | 1,990,048 | | 178,850 | 0 | 0 | 178,850 | end of 2 |
| end of 3 | 63 | 240,072 | 0 | 1,750,000 | 0 | 1,990,072 | | 182,785 | 0 | 0 | 182,785 | end of 3 |
| end of 4 | 64 | 240,096 | 0 | 1,750,000 | 0 | 1,990,096 | | 186,806 | 0 | 0 | 186,806 | end of 4 |
| end of 5 | 65 | 240,120 | 0 | 1,750,000 | 0 | 1,990,120 | | 0 | 33,600 | 48,000 | 81,600 | end of 5 |
| end of 6 | 66 | 240,144 | 0 | 1,750,000 | 0 | 1,990,144 | | 0 | 34,440 | 49,200 | 83,640 | end of 6 |
| end of 7 | 67 | 240,168 | 0 | 1,750,000 | 0 | 1,990,168 | | 0 | 35,301 | 50,430 | 85,731 | end of 7 |
| end of 8 | 68 | 240,192 | 0 | 1,750,000 | 0 | 1,990,192 | | 0 | 36,184 | 51,691 | 87,874 | end of 8 |
| end of 9 | 69 | 240,216 | 0 | 1,750,000 | 0 | 1,990,216 | | 0 | 37,088 | 52,983 | 90,071 | end of 9 |
| end of 10 | 70 | 240,240 | 0 | 1,750,000 | 0 | 1,990,240 | | 0 | 38,015 | 54,308 | 92,323 | end of 10 |
| end of 11 | 71 | 240,264 | 0 | 1,750,000 | 0 | 1,990,264 | | 0 | 38,966 | 55,665 | 94,631 | end of 11 |
| end of 12 | 72 | 240,288 | 0 | 1,750,000 | 0 | 1,990,288 | | 0 | 39,940 | 57,057 | 96,997 | end of 12 |
| end of 13 | 73 | 240,312 | 0 | 1,750,000 | 0 | 1,990,312 | | 0 | 40,938 | 58,483 | 99,422 | end of 13 |
| end of 14 | 74 | 240,336 | 0 | 1,750,000 | 0 | 1,990,336 | | 0 | 41,962 | 59,945 | 101,907 | end of 14 |
| end of 15 | 75 | 240,360 | 0 | 1,750,000 | 0 | 1,990,360 | | 0 | 43,011 | 61,444 | 104,455 | end of 15 |
| end of 16 | 76 | 240,384 | 0 | 1,750,000 | 0 | 1,990,384 | | 0 | 44,086 | 62,980 | 107,066 | end of 16 |
| | | | 0 | | 0 | | | 723,441 | 463,531 | 662,186 | 1,849,158 | |

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: New Scenario (3)

Planning Horizon: 16 years | Checkings/Savings Account (4) | Individual Roth IRA (4)

| Year | | Account | Income | Account | Income | Accounts Total | Planned Distribution | Wages (5) | SS (5) | Pension (4) | Total Income | Year |
|----------------|----|---------|--------|-----------|--------|----------------|----------------------|-----------|---------|-------------|--------------|-----------|
| net return | 60 | 0.01 % | | 0.00 % | | 1,990,000 | | | | | | |
| initial amount | | 240,000 | | 1,750,000 | | 1,990,000 | | | | | | |
| bonus % | | 0.00 % | | 0.00 % | | 0 | | | | | | |
| w/bonus | | 240,000 | | 1,750,000 | | 1,990,000 | | | | | | |
| end of 1 | 61 | 240,024 | 0 | 1,750,000 | 0 | 1,990,024 | | 175,000 | 0 | 0 | 175,000 | end of 1 |
| end of 2 | 62 | 240,048 | 0 | 1,750,000 | 0 | 1,990,048 | | 178,850 | 0 | 0 | 178,850 | end of 2 |
| end of 3 | 63 | 240,072 | 0 | 1,750,000 | 0 | 1,990,072 | | 182,785 | 0 | 0 | 182,785 | end of 3 |
| end of 4 | 64 | 240,096 | 0 | 1,750,000 | 0 | 1,990,096 | | 186,806 | 0 | 0 | 186,806 | end of 4 |
| end of 5 | 65 | 240,120 | 0 | 1,750,000 | 0 | 1,990,120 | | 0 | 33,600 | 48,000 | 81,600 | end of 5 |
| end of 6 | 66 | 240,144 | 0 | 1,750,000 | 0 | 1,990,144 | | 0 | 34,440 | 49,200 | 83,640 | end of 6 |
| end of 7 | 67 | 240,168 | 0 | 1,750,000 | 0 | 1,990,168 | | 0 | 35,301 | 50,430 | 85,731 | end of 7 |
| end of 8 | 68 | 240,192 | 0 | 1,750,000 | 0 | 1,990,192 | | 0 | 36,184 | 51,691 | 87,874 | end of 8 |
| end of 9 | 69 | 240,216 | 0 | 1,750,000 | 0 | 1,990,216 | | 0 | 37,088 | 52,983 | 90,071 | end of 9 |
| end of 10 | 70 | 240,240 | 0 | 1,750,000 | 0 | 1,990,240 | | 0 | 38,015 | 54,308 | 92,323 | end of 10 |
| end of 11 | 71 | 240,264 | 0 | 1,750,000 | 0 | 1,990,264 | | 0 | 38,966 | 55,665 | 94,631 | end of 11 |
| end of 12 | 72 | 240,288 | 0 | 1,750,000 | 0 | 1,990,288 | | 0 | 39,940 | 57,057 | 96,997 | end of 12 |
| end of 13 | 73 | 240,312 | 0 | 1,750,000 | 0 | 1,990,312 | | 0 | 40,938 | 58,483 | 99,422 | end of 13 |
| end of 14 | 74 | 240,336 | 0 | 1,750,000 | 0 | 1,990,336 | | 0 | 41,962 | 59,945 | 101,907 | end of 14 |
| end of 15 | 75 | 240,360 | 0 | 1,750,000 | 0 | 1,990,360 | | 0 | 43,011 | 61,444 | 104,455 | end of 15 |
| end of 16 | 76 | 240,384 | 0 | 1,750,000 | 0 | 1,990,384 | | 0 | 44,086 | 62,980 | 107,066 | end of 16 |
| | | | 0 | | 0 | | | 723,441 | 463,531 | 662,186 | 1,849,158 | |

Orange backgrounds indicate hypothetical returns

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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

Structured Income Planning

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

Scenario: New Scenario (3)

Planning Horizon: 1 years

| Year | Account | Income | Account | Income | Accounts Total | Planned Distribution | Wages (5) | SS (5) | Pension (4) | Total Income | Year |
|-----------------|---------|---------|---------|-----------|----------------|-----------------------------|--------------------|--------------------|--------------------|--------------|-----------|
| net return | 60 | 0.01 % | | 0.00 % | 1,990,000 | | | | | | |
| initial amount | | 240,000 | | 1,750,000 | 0 | Subtotal of account incomes | Manage Infl Factor | Manage Infl Factor | Manage Infl Factor | | |
| bonus % w/bonus | | 0.00 % | | 0.00 % | 1,990,000 | | 2.20 % | 2.50 % | 2.50 % | | |
| end of 1 | 61 | 240,024 | 0 | 1,750,000 | 0 | 1,990,024 | 0 | 175,000 | 0 | 175,000 | end of 1 |
| end of 2 | 62 | 240,048 | 0 | 1,750,000 | 0 | 1,990,048 | 0 | 178,850 | 0 | 178,850 | end of 2 |
| end of 3 | 63 | 240,072 | 0 | 1,750,000 | 0 | 1,990,072 | 0 | 182,785 | 0 | 182,785 | end of 3 |
| end of 4 | 64 | 240,096 | 0 | 1,750,000 | 0 | 1,990,096 | 0 | 186,806 | 0 | 186,806 | end of 4 |
| end of 5 | 65 | 240,120 | 0 | 1,750,000 | 0 | 1,990,120 | 0 | 33,600 | 48,000 | 81,600 | end of 5 |
| end of 6 | 66 | 240,144 | 0 | 1,750,000 | 0 | 1,990,144 | 0 | 34,440 | 49,200 | 83,640 | end of 6 |
| end of 7 | 67 | 240,168 | 0 | 1,750,000 | 0 | 1,990,168 | 0 | 35,301 | 50,430 | 85,731 | end of 7 |
| end of 8 | 68 | 240,192 | 0 | 1,750,000 | 0 | 1,990,192 | 0 | 36,184 | 51,691 | 87,874 | end of 8 |
| end of 9 | 69 | 240,216 | 0 | 1,750,000 | 0 | 1,990,216 | 0 | 37,088 | 52,983 | 90,071 | end of 9 |
| end of 10 | 70 | 240,240 | 0 | 1,750,000 | 0 | 1,990,240 | 0 | 38,015 | 54,308 | 92,323 | end of 10 |
| end of 11 | 71 | 240,264 | 0 | 1,750,000 | 0 | 1,990,264 | 0 | 38,966 | 55,665 | 94,631 | end of 11 |
| end of 12 | 72 | 240,288 | 0 | 1,750,000 | 0 | 1,990,288 | 0 | 39,940 | 57,057 | 96,997 | end of 12 |
| end of 13 | 73 | 240,312 | 0 | 1,750,000 | 0 | 1,990,312 | 0 | 40,938 | 58,483 | 99,422 | end of 13 |
| end of 14 | 74 | 240,336 | 0 | 1,750,000 | 0 | 1,990,336 | 0 | 41,962 | 59,945 | 101,907 | end of 14 |
| end of 15 | 75 | 240,360 | 0 | 1,750,000 | 0 | 1,990,360 | 0 | 43,011 | 61,444 | 104,455 | end of 15 |
| end of 16 | 76 | 240,384 | 0 | 1,750,000 | 0 | 1,990,384 | 0 | 44,086 | 62,980 | 107,066 | end of 16 |
| | | 0 | | 0 | 0 | 0 | 723,441 | 463,531 | 662,186 | 1,849,158 | |

Orange backgrounds indicate hypothetical returns

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

YOUR CASE LIST | SETTINGS | HELP | **SIGN OUT**

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

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

Structured Income Planning

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

Scenario: New Scenario (3)

Planning Horizon: 16 years

| Year | Account | Income | Account | Income | Accounts Total | Planned Distribution | Wages (5) | SS (5) | Pension (4) | Total Income | Year |
|-----------------|---------|---------|---------|-----------|----------------|-----------------------------|-------------|-------------|-------------|--------------|-----------|
| net return | 60 | 0.01 % | | 0.00 % | 1,990,000 | | | | | | |
| initial amount | | 240,000 | | 1,750,000 | 0 | Subtotal of account incomes | Infl Factor | Infl Factor | Infl Factor | | |
| bonus % w/bonus | | 0.00 % | | 0.00 % | 1,990,000 | | 2.20 % | 2.50 % | 2.50 % | | |
| end of 1 | 61 | 240,024 | 0 | 1,750,000 | 0 | 1,990,024 | 0 | 175,000 | 0 | 175,000 | end of 1 |
| end of 2 | 62 | 240,048 | 0 | 1,750,000 | 0 | 1,990,048 | 0 | 178,850 | 0 | 178,850 | end of 2 |
| end of 3 | 63 | 240,072 | 0 | 1,750,000 | 0 | 1,990,072 | 0 | 182,785 | 0 | 182,785 | end of 3 |
| end of 4 | 64 | 240,096 | 0 | 1,750,000 | 0 | 1,990,096 | 0 | 186,806 | 0 | 186,806 | end of 4 |
| end of 5 | 65 | 240,120 | 0 | 1,750,000 | 0 | 1,990,120 | 0 | 33,600 | 48,000 | 81,600 | end of 5 |
| end of 6 | 66 | 240,144 | 0 | 1,750,000 | 0 | 1,990,144 | 0 | 34,440 | 49,200 | 83,640 | end of 6 |
| end of 7 | 67 | 240,168 | 0 | 1,750,000 | 0 | 1,990,168 | 0 | 35,301 | 50,430 | 85,731 | end of 7 |
| end of 8 | 68 | 240,192 | 0 | 1,750,000 | 0 | 1,990,192 | 0 | 36,184 | 51,691 | 87,874 | end of 8 |
| end of 9 | 69 | 240,216 | 0 | 1,750,000 | 0 | 1,990,216 | 0 | 37,088 | 52,983 | 90,071 | end of 9 |
| end of 10 | 70 | 240,240 | 0 | 1,750,000 | 0 | 1,990,240 | 0 | 38,015 | 54,308 | 92,323 | end of 10 |
| end of 11 | 71 | 240,264 | 0 | 1,750,000 | 0 | 1,990,264 | 0 | 38,966 | 55,665 | 94,631 | end of 11 |
| end of 12 | 72 | 240,288 | 0 | 1,750,000 | 0 | 1,990,288 | 0 | 39,940 | 57,057 | 96,997 | end of 12 |
| end of 13 | 73 | 240,312 | 0 | 1,750,000 | 0 | 1,990,312 | 0 | 40,938 | 58,483 | 99,422 | end of 13 |
| end of 14 | 74 | 240,336 | 0 | 1,750,000 | 0 | 1,990,336 | 0 | 41,962 | 59,945 | 101,907 | end of 14 |
| end of 15 | 75 | 240,360 | 0 | 1,750,000 | 0 | 1,990,360 | 0 | 43,011 | 61,444 | 104,455 | end of 15 |
| end of 16 | 76 | 240,384 | 0 | 1,750,000 | 0 | 1,990,384 | 0 | 44,086 | 62,980 | 107,066 | end of 16 |
| | | 0 | | 0 | 0 | 0 | 723,441 | 463,531 | 662,186 | 1,849,158 | |

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