Condense All and Uncondense All Function

11/27/2024 2:20 pm EST

If you have a structured income plan with many individual accounts and income sources, there is a function to consolidate all of these columns. Below is a step-by-step guideline for condensing and un-condensing all functions.

| | | | | | | | | | | | | | | | PREPARED BY: | |
|------------------------|---------------|--------------------|--------------|------------------------|--------------|------------------------|----------------------------|------------------------|------------------------|-------------|------------------|------------------|-------------------|------------------------|--------------------|--|
| | | | | | | | | | | | | | | | INITIAL PLAN DATE: | |
| NT DASHBO | ARD STR | UCTURED INCOM | AE PLANNING | CASH FLO | OW AND TAX A | DVISOR A | SSET ALLOCA | TION AND NET | WORTH G | RAPHS R | EPORTS 1 | OOLS | | | REVISED PLAN DATE: | |
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| ructi | I boru | ncome | e Plar | ning | | | | | | | | | | | | |
| Dynamic | | | | 0 | | | | | | | | | | | | |
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| Cond | dense All and | Uncondense / | All Function | | | | ~ | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | Accor | unts | | $\mathcal{A}_{\mathbb{K}}$ | | | | | | | | | |
| nning | 20 years 🗸 | Ohudiin | 10 | | | | | | 1 | | | 2 | | | | |
| izon | zu years 🗸 | | s/Savings | Individua | al Roth IRA | 40 | 1(k) | | | | Incomes | 74 | | | | |
| | | | | | | | | Accounts | Planned | | | | Total | | | |
| Year | | Account | Income | Account | Income | Account | Income | Total | Distribution | Wages | SS | VRBO | Income | Year | | |
| net return | 50 | 0.00 % | | 5.20 % 1,500,000 | | 3.70 % 850,000 | IRA | 0.505.000 | Outeral | | | | | | | |
| tial amount bonus % | | 0.00 % | | 0.00 % | | 0.00 % | | 2,525,000 | Subtotal of account | Infl Factor | Infl Factor | Infl Factor | | | | |
| w/bonus | | 175,000 | | 1,500,000 | | 850,000 | | 2,525,000 | incomes | 2.00 % | 2.50 % | 5.00 % | | | | |
| end of 1 | 51 | 175,002 | 0 | 1,578,000 | 0 | 881,450 | 0 | 2,634,452 | 0 | 150,000 | 0 | 14,400 | 164,400 | end of 1 | | |
| end of 2 | 52 | 175,004 | 0 | 1,660,056 | 0 | 914,064 | 0 | 2,749,123 | 0 | 153,000 | 0 | 15,120 | 168,120 | end of 2 | | |
| end of 3 | 53 | 175,005 | 0 | 1,746,379 | 0 | 947,884 | 0 | 2,869,268 | 0 | 156,060 | 0 | 15,876 | 171,936 | end of 3 | | |
| end of 4 | 54 | 175,007 | 0 | 1,837,191 | 0 | 982,956 | 0 | 2,995,154 | 0 | 159,181 | 0 | 16,670 | 175,851 | end of 4 | | |
| end of 5 | 55 | 175,009 | 0 | 1,932,725 | 0 | 1,019,325 | 0 | 3,127,058 | 0 | 162,365 | 0 | 17,503 | 179,868 | end of 5 | | |
| end of 6 | 56 | 175,010 | 0 | 2,033,227 | 0 | 1,057,040 | 0 | 3,265,277 | 0 | 165,612 | 0 | 18,378 | 183,991 | end of 6 | | |
| end of 7 | 57 | 175,012 | 0 | 2,138,955 | 0 | 1,096,150 | 0 | 3,410,117 | 0 | 168,924 | 0 | 19,297 | 188,222 | end of 7 | | |
| end of 8 | 58 | 175,014 | 0 | 2,250,180 | 0 | 1,136,708 | 0 | 3,561,902 | 0 | 172,303 | 0 | 20,262 | 192,565 | end of 8 | | |
| end of 9 | 59 | 175,016 | 0 | 2,367,190 | 0 | 1,178,766 | 0 | 3,720,972 | 0 | 175,749 | 0 | 21,275 | 197,024 | end of 9 | | |
| end of 10 | 60 | 175,018 | 0 | 2,490,284 | 0 | 1,222,380 | 0 | 3,887,682 | 0 | 179,264 | 0 | 22,339 | 201,603 | end of 10 | | |
| end of 11 | 61 | 175,019 | 0 | 2,619,779 | 0 | 1,267,608 | 0 | 4,062,406 | 0 | 182,849 | 0 | 23,456 | 206,305 | end of 11 | | |
| end of 12 | 62 | 175,021 | 0 | 2,756,008 | 0 | 1,314,509 | 0 | 4,245,538 | 0 | 186,506 | 0 | 24,629 | 211,135 | end of 12 | | |
| end of 13 end of 14 | 63 64 | 175,023 | 0 | 2,899,320 | 0 | 1,363,146 | 0 | 4,437,489 | 0 | 190,236 | 0 | 25,860 | 216,097 | end of 13 | | |
| end of 14 end of 15 | 65 | 175,024 175,026 | 0 | 3,050,085 3,208,690 | 0 | 1,413,582 1,465,885 | 0 | 4,638,692 4,849,601 | 0 | 194,041 | 37,334 | 27,153 28,511 | 221,194 65,845 | end of 14 end of 15 | | |
| end of 15 end of 16 | 66 | 175,026 | 0 | 3,208,690 | 0 | 1,465,885 | 0 | 5,070,692 | 0 | 0 | 37,334 38,267 | 28,511 | | end of 15 end of 16 | | |
| end of 16 end of 17 | 67 | 175,028 | 0 | 3,375,542 | 0 | 1,520,123 | 0 | 5,070,692 | 0 | 0 | 38,207 | 31,433 | 68,204 70,657 | end of 16 end of 17 | | |
| end of 17 end of 18 | 68 | 175,030 | 0 | 3,735,726 | 0 | 1,634,693 | 0 | 5,545,450 | 0 | 0 | 40,205 | 33,005 | 73,210 | end of 17 end of 18 | | |
| end of 19 | 69 | 175,032 | 0 | 3,929,984 | 0 | 1,695,176 | 0 | 5,800,193 | | 0 | 41,210 | 34,655 | 75,865 | end of 19 | | |
| end of 20 | 70 | 175,035 | 0 | 4,134,343 | 0 | 1,757,898 | 0 | 6,067,276 | 0 | 0 | 42,240 | 04,000 | 42,240 | end of 20 | | |
| 10 01 20 | .0 | | 0 | 1,104,040 | 0 | 1,1 01,010 | 0 | 0,007,270 | 0 | 2,396,090 | 238,480 | 439,761 | 3.074.332 | 0110 01 20 1 | | |
| | | | | | | | | | | | | | | | | |

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

| | | | | | | | | | | | | | | YOUR | CASE LIST SETTINGS | HELP SIGN O |
|---------------------------|----------------|--------------------|---------------------|------------------------|--------------|---------------------|-------------|------------------------|-------------------------|-----------------------|-----------------------|-----------------------|--------------------|----------------------|--------------------|-------------|
| | | | | | | | | | | | | | | | PREPARED BY: | |
| | | | | 1.22 | | 1.20 | | | 22 | | | | | | INITIAL PLAN DATE: | |
| CLIENT DASHBO | ARD STR | UCTURED INCO | ME PLANNING | CASH FLO | OW AND TAX A | DVISOR A | SSET ALLOCA | TION AND NET | WORTH 0 | SRAPHS R | EPORTS 1 | TOOLS | | | REVISED PLAN DATE: | |
| Struct | urod l | ncom | | nina | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Edit Save C | Cancel Add | Account Add | Income A | dd Inc Tax A | Add Target | dit or Add Sc | enario Disp | olay Options | - | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Scenario Con | idense All and | Uncondense | All Function | | | | ~ | | | | | | | | | |
| | | | | Acco | | | 74 | | | | | | | | | |
| Planning | | | | ACCO | unta | - | | | | | | | | | | |
| Horizon | 20 years V | | gs/Savings count | Individua | al Roth IRA | 40 | 01(k) | | | | Incomes | × | | | | |
| Year | | Account | Income | Account | Income | Account | Income | Accounts Total | Planned Distribution | Wages | SS | VRBO | Total Income | Year | | |
| net return | 50 | 0.00 % |) | 5.20 % | | 3.70 % | IRA | | Sector Control | | - | | | | | |
| initial amount bonus % | | 175,000 0.00 % | | 1,500,000 0.00 % | | 850,000 0.00 % | | 2,525,000 | Subtotal of account | Manage Infl Factor | Manage Infl Factor | Manage Infl Factor | | | | |
| w/bonus | | 175,000 | Manage | 1,500,000 | Manage | 850,000 | Manage | 2,525,000 | incomes | 2.00 % | 2.50 % | 5.00 % | | | | |
| end of 1 | 51 | 175,002 | 0 | 1,578,000 | 0 | 881,450 | 0 | 2,634,452 | 0 | 150,000 | 0 | 14,400 | 164,400 | end of 1 | | |
| end of 2 | 52 | 175,004 | 0 | 1,660,056 | 0 | 914,064 | 0 | 2,749,123 | 0 | | 0 | 15,120 | 168,120 | end of 2 | | |
| end of 3 | 53 | 175,005 | 0 | 1,746,379 | 0 | 947,884 | 0 | 2,869,268 | 0 | 156,060 | 0 | 15,876 | 171,936 | end of 3 | | |
| end of 4 | 54 | 175,007 | 0 | 1,837,191 | 0 | 982,956 | 0 | 2,995,154 | 0 | | 0 | 16,670 | 175,851 | end of 4 | | |
| end of 5 | 55 | 175,009 | 0 | 1,932,725 | 0 | 1,019,325 | 0 | 3,127,058 | 0 | | 0 | 17,503 | 179,868 | end of 5 | | |
| end of 6 end of 7 | 56 57 | 175,010 175,012 | 0 | 2,033,227 2,138,955 | 0 | 1,057,040 1,096,150 | 0 | 3,265,277 3,410,117 | 0 | 165,612 168,924 | 0 | 18,378 19,297 | 183,991 188,222 | end of 6 end of 7 | | |
| end of 8 | 58 | 175,012 | 0 | 2,138,955 | 0 | 1,136,708 | 0 | 3,410,117 | 0 | 172,303 | 0 | 20,262 | 192,565 | end of 7 end of 8 | | |
| end of 9 | 59 | 175,014 | 0 | 2,250,180 | 0 | 1,178,766 | 0 | 3,720,972 | 0 | 175,749 | 0 | 21,275 | 192,303 | end of 9 | | |
| end of 10 | 60 | 175,018 | 0 | 2,490,284 | 0 | 1,222,380 | 0 | 3.887.682 | ő | 179,264 | 0 | 22,339 | 201.603 | end of 10 | | |
| end of 11 | 61 | 175,019 | 0 | 2,619,779 | 0 | 1,267,608 | 0 | 4,062,406 | 0 | 182,849 | 0 | 23,456 | 206,305 | end of 11 | | |
| end of 12 | 62 | 175,021 | 0 | 2,756,008 | 0 | 1,314,509 | 0 | 4,245,538 | 0 | 186,506 | 0 | 24,629 | 211,135 | end of 12 | | |
| end of 13 | 63 | 175,023 | 0 | 2,899,320 | 0 | 1,363,146 | 0 | 4,437,489 | 0 | 190,236 | 0 | 25,860 | 216,097 | end of 13 | | |
| end of 14 | 64 | 175,024 | 0 | 3,050,085 | 0 | 1,413,582 | 0 | 4,638,692 | 0 | 194,041 | 0 | 27,153 | 221,194 | end of 14 | | |
| end of 15 | 65 | 175,026 | 0 | 3,208,690 | 0 | 1,465,885 | 0 | 4,849,601 | 0 | 0 | 37,334 | 28,511 | 65,845 | end of 15 | | |
| end of 16 | 66 | 175,028 | 0 | 3,375,542 | 0 | 1,520,123 | 0 | 5,070,692 | 0 | | 38,267 | 29,937 | 68,204 | end of 16 | | |
| end of 17 | 67 | 175,030 | 0 | 3,551,070 | 0 | 1,576,367 | 0 | 5,302,466 | 0 | | 39,224 | 31,433 | 70,657 | end of 17 | | |
| end of 18 | 68 | 175,032 | 0 | 3,735,726 | 0 | 1,634,693 | 0 | 5,545,450 | 0 | 0 | 40,205 | 33,005 | 73,210 | end of 18 | | |
| | 69 | 175,033 | 0 | 3,929,984 | 0 | 1,695,176 | 0 | 5,800,193 | 0 | 0 | 41,210 | 34,655 | 75,865 | end of 19 | | |
| end of 19 | 70 | 175,035 | 0 | 4,134,343 | 0 | 1,757,898 | 0 | 6,067,276 | 0 | 0 | 42,240 | 0 | 42,240 | end of 20 | | |
| end of 19 end of 20 | 1 10 | | 0 | | 0 | | 0 | | 0 | 2,396,090 | 238,480 | 439,761 | 3,074,332 | | | |

Step 3: Condense All: Click on the green Condense All button located in the Account and Income Grouping table.

| Column Disp | blay Options View RMD Checks Hide In | come Riders View | Death Benefit | View % Distri | ibution View | v Comparison | View Tax R | ates View Ca | alendar Years | | |
|-------------------|---|-----------------------|---------------|----------------|--------------|--------------|------------|--------------|-----------------------------|-------|-----|
| | | | | | | | | | | | |
| | Account a | nd Income Grou | ping | | | | | | Group Setup | | |
| | | Accounts | | | | | | | Accounts | | |
| | | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | | Title | | Color | |
| Checkings/Savi | gs Account | ۲ | 0 | 0 | 0 | 0 | Group 1 | Accounts | | | Sel |
| Individual Roth I | A | ۲ | 0 | 0 | 0 | 0 | Group 2 | | | | Sel |
| 401(k) | | ۲ | 0 | 0 | 0 | 0 | Group 3 | | | | Sel |
| | | | | | | | Group 4 | | | | Sel |
| | | Incomes | | | | | Group 5 | | | | Sel |
| Wages | | ۲ | 0 | 0 | 0 | 0 | | | | | |
| SS | | ۲ | 0 | 0 | 0 | 0 | 11 | | Incomes | | |
| VRBO | | ۲ | 0 | 0 | 0 | 0 | | Title | | Color | |
| | | | | | | | Group 1 | Incomes | | | Sel |
| | e groups must be created in the sequential ord | | | | | | Group 2 | | | _ | Sel |
| | e-order accounts using the Edit Scenario functi | | | | | groups. | Group 3 | | | _ | Sel |
| Reordering or a | ing accounts or incomes on the Edit Scenario f | unction requires that | the above gro | up information | be reset. | | Group 4 | | | _ | Sel |
| | | | | | | | Group 5 | | | | Sel |
| Reset Conden | ise All Uncondense All | | | | | | | | | | |
| | | | | | | | Reset T | tle / Colors | Copy Setup To All Scenarios | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| Return With Group | bing Return Without Grouping | | | | | | | | | | |
| | and a stouping | | | | | | | | | | |

Step 4: Structured Income Planning Page: The accounts and income columns have been condensed into two separate columns: Accounts Group and Income Group.

| | | | | 5 | | | 125 | | | |
|---|---------------|----------------|---------------|-----------------------|--------------|--------------|-----------------------------|--------------|--------------|-------|
| CLENT DARRIEDAND ENDICITIERE INCOME ELANING CASH FLOW AND TXX DUNSCI ASSET ALLOCATION AND NET WORTH GRAPH TOLLS TOLLS Structured Not income Add Incom Marting Eliter di Scenario Display Options Structured Add Account Add Incom Marting Eliter di Scenario Display Options Verri Account Account Totalia Display Options Tenning 20 years Grouped Totalia Display Options Verri Account Incomes Account Display Options Verri Account Display Options Parting 12 years Grouped Totalia Display Options Verri Account Display Options Year 12 22 years Orouped Totalia Parting 12 22 years Orouped 22 22 2000 Orouped Totalia 12 22 22 2000 Grouped 22 22 2000 Orouped Totalia 12 22 years 2 22 22 2000 Subbala Orouped Totalia 12 22 22 2000 17 19 28 Orouped 16 4,200 Indo 1 1 12 22 22 2000 17 19 28 Indo 1 20 19 20 20 19 20 20 12 22 22 49 213 | | | - | | | | | | | |
| Structured income Planning Barning Order Add Rocourt Add Tor Tor Add Targe Effer or discension Display Options Barning Option Accounts Incomes Incomes Terr Hum Occounts Incomes Incomes Terr Hum Option Subbala Official Vear On of a 51 Zossbool Grouped Incomes Value Accounts Distribution Official Vear On of a 51 Zossbool Grouped Incomes Value Accounts Distribution Official Vear On of a 51 Zossbool Grouped Incomes Value Accounts Distribution Official Vear Ord A 52 Zossbool Grouped Incomes Vear Out of A 53 Zossbool Grouped Zossbool Incomes Vear Ord A 55 3322/268 0 Zizzbool Incomes Vear Odd of a Social a Off A <th< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th<> | | | | | | | | | | |
| Image: Serve in the s | CLIENT DASHBO | OARD STRU | JCTURED INCO | ME PLANNING | CASH FL | OW AND TAX A | DVISOR ASS | ET ALLOCATIO | ON AND NET W | TWORT |
| Image: Serve in the s | Struct | urod lu | acom | o Diar | ning | | | | | |
| Scenario Condense All and Uncondense All Function Marning training contact Zo years Grouped Income Vear Account Income Year Net return bonus % 50 Grouped O af accounts Grouped 2.255.000 Grouped 2.255.000 Grouped 10.4400 164.400 bonus % 2.255.000 Grouped 0.07 accounts Income Marciant end of 1 51 2.255.000 Grouped 0.07 accounts 164.400 164.400 end of 1 end of 2 2.854.262 0 2.255.000 0.778.851 177.856 end of 3 end of 4 54 2.995.754 0 138.391 183.991 end of 4 end of 5 55 3.127.058 0 177.856 197.8565 end of 1 end of 7 57 3.401.17 0 188.991 end of 1 end of 1 end of 7 57 3.402.406 0 4.462.406 0 4.462.406 0 | | | | | | | | | | 2 |
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| Accounts Accounts Incomes Year Account Income Account Incomes Year Account Income Account Planned Grouped Initial amount 50 2.252,000 Grouped 2.252,000 Subtrait O account Incomes Whonus 2.252,000 Grouped 2.252,000 Subtrait O account Incomes end of 1 51 2.252,000 Couped 1.64,400 end of 1 end of 3 end of 3 52 2.749,123 0 1.64,400 end of 1 end of 3 end of 3 53 2.865,271 0 2.855,200 0 1.71,356 end of 3 end of 5 53 3.127,058 0 1.71,356 end of 5 end of 6 9.265,277 0 3.182,221 end of 5 end of 6 3.265,277 0 3.182,222 end of 7 end of 7 6 3.265,277 0 3.182,222 end of 7 end of 6 3.265,277 0 3.265,277 0 3.2 | | | | | | | | | | |
| Accounts Accounts Incomes Year Account Income Account Incomes Year Account Income Account Planned Grouped Initial amount 50 2.252,000 Grouped 2.252,000 Subtrait O account Incomes Whonus 2.252,000 Grouped 2.252,000 Subtrait O account Incomes end of 1 51 2.252,000 Couped 1.64,400 end of 1 end of 3 end of 3 52 2.749,123 0 1.64,400 end of 1 end of 3 end of 3 53 2.865,271 0 2.855,200 0 1.71,356 end of 3 end of 5 53 3.127,058 0 1.71,356 end of 5 end of 6 9.265,277 0 3.182,221 end of 5 end of 6 3.265,277 0 3.182,222 end of 7 end of 7 6 3.265,277 0 3.182,222 end of 7 end of 6 3.265,277 0 3.265,277 0 3.2 | | | | | | | | | | |
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| Naming brizzo 2 years Korout Income Account Total Planned Distribution Total Distribution Total Distribution Year Net return imbial mount bonus whonus 50 2,252,000 4,000ut Groupe 2,252,000 2,252,000 Subtal Distribution 6fouped Distribution 164,400 164,400 end of 1 end of 1 end of 2 52,27,49,22 0 2,652,000 0 do account Distribution 168,120 168,120 end of 1 end of 2 end of 3 S 2,869,268 0 177,386 end of 3 end of 4 2,952,700 0 3,269,277 0 188,991 end of 5 end of 7 S 3,101,17 0 3,451,017 0 188,991 end of 1 end of 1 end of 1 S 3,51,902 0 3,269,278 0 3,269,278 0 129,256 end of 7 end of 7 S 3,101,17 0 3,451,017 0 3,82,222 188,222 end of 1 end of 1 S 6,05,782 0 3,265,277 0 137,936 end of 1 end of 1 S 6,05,782 0 3,265,277 0 3,265,277 0 3,265,277 0 3,265,277 0 3, | | | | | | | | | | |
| Naming brizzo 2 years Korout Income Account Total Planned Distribution Total Distribution Total Distribution Year Net return imbial mount bonus whonus 50 2,252,000 4,000ut Groupe 2,252,000 2,252,000 Subtal Distribution 6fouped Distribution 164,400 164,400 end of 1 end of 1 end of 2 52,27,49,22 0 2,652,000 0 do account Distribution 168,120 168,120 end of 1 end of 2 end of 3 S 2,869,268 0 177,386 end of 3 end of 4 2,952,700 0 3,269,277 0 188,991 end of 5 end of 7 S 3,101,17 0 3,451,017 0 188,991 end of 1 end of 1 end of 1 S 3,51,902 0 3,269,278 0 3,269,278 0 129,256 end of 7 end of 7 S 3,101,17 0 3,451,017 0 3,82,222 188,222 end of 1 end of 1 S 6,05,782 0 3,265,277 0 137,936 end of 1 end of 1 S 6,05,782 0 3,265,277 0 3,265,277 0 3,265,277 0 3,265,277 0 3, | | | ٨٠٠٠ | unte K | | | 1 | | | |
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| Year Count Account Income Year Inclement initial amount boruss 50 Grouped 2,525,000 Subtala 0 of account Income Year Valorus 2,525,000 Grouped 2,525,000 Subtala 0 of account Income Year end of 1 51 2,525,000 2,252,000 Income Year end of 2 end of 2 52 2,749,123 0 2,689,268 0 171,936 end of 2 end of 3 53 2,869,268 0 2,989,154 0 175,861 end of 3 end of 5 55 3,127,058 0 179,866 H78,868 end of 5 end of 5 55 3,265,277 0 3,80,170 0 188,222 end of 5 end of 6 56 3,265,277 0 3,80,170 0 19,7024 end of 9 end of 7 3,410,117 0 3,820,172 0 19,7024 end of 1 end of 10 66 3,87,682 | HUIIZUII | _ | | Japea | | | incontes | | | _ |
| Interferent 50 2.525,000 Grouped 2.525,000 Subtrait of account borus % 2.525,000 0 0 subtrait of account end of 1 51 2.525,000 2.525,000 incomes end of 2 52 2,749,123 0 2.634,452 0 164,400 end of 1 end of 2 52 2,749,123 0 2.692,660 0 177,936 end of 3 end of 4 54 2.995,154 0 2.692,677 0 183,991 183,991 end of 4 end of 5 53 3.127,058 0 179,866 red of 7 end of 6 end of 6 56 3.252,777 0 3.89,791 183,991 183,991 end of 6 end of 7 57 3.410,117 0 3.82,727 0 192,865 red of 7 end of 9 3.87,682 0 3.887,682 0 201,603 end of 8 end of 10 60 3.887,682 < | Year | | Account | Income | | | Grouped | | Year | |
| bonus forupe Groupe 0 of account incomes Method end of 1 end of 1 51 2,525.00 2,652.00 incomes end of 1 end of 2 52 2,749.123 0 2,652.00 if68,120 end of 2 end of 3 53 2,662.08 0 2,662.06 0 179,86 end of 3 end of 4 54 2,995,154 0 2,869.268 0 179,866 end of 4 end of 5 53 3,127.058 0 179,866 end of 5 end of 6 end of 6 56 3,252.77 0 3,83.991 188.922 end of 6 end of 7 7 3,410.17 0 188.222 end of 7 end of 8 58 3,561.902 0 206,603 end of 10 end of 1 61 4,662,406 0 206,603 end of 11 end of 13 63 4,437,489 0 211,138 211,138 end of 13 end of 1 | net return | 50 | | Grouped | rotar | Distribution | | meonie | | |
| whoms v 2.525,000 v 2.525,000 incomes v v end of 1 51 2.634,452 0 2.634,452 0 164,400 end of 2 end of 3 52 2.749,123 0 2.634,452 0 168,120 end of 2 end of 3 53 2.899,268 0 2.749,123 0 171,936 end of 3 end of 4 55 3.127,058 0 177,856 177,868 end of 6 end of 5 56 3.265277 0 127,856 177,868 179,866 179,866 end of 6 56 3.265277 0 3.265,277 0 183,991 end of 6 end of 7 57 3.410,117 0 183,991 88,022 end of 7 end of 8 3.561,902 0 3.720,972 0 3.720,972 0 3.720,972 0 3.720,972 0 3.720,972 0 2.06,030 end of 1 end of 10 6.62,446 <td></td> <td></td> <td>2,525,000</td> <td>2002300007 24 - 22</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> | | | 2,525,000 | 2002300007 24 - 22 | | | | | | |
| end of 1 51 2634,452 0 2634,452 0 164,400 end of 1 end of 2 52 27,49173 0 2749,123 0 168,120 end of 1 end of 3 53 2,869,268 0 2,869,268 0 171,936 end of 3 end of 4 54 2,995,154 0 2,995,154 0 173,861 175,861 end of 4 end of 5 53 3,127,058 0 3,127,058 0 179,866 end of 5 end of 6 56 3,265,277 0 3,82,728 0 197,866 end of 6 end of 7 7 3,410,117 0 3,862,720 0 192,865 197,024 end of 7 end of 8 58 3,551,902 0 3,760,032 201,603 end of 10 end of 9 end of 10 60 3,887,682 0 201,603 end of 11 end of 12 end of 11 61 4,467,489 0 4,474,7489 0 21,194 end of 14 end of 13 63 4,437,489 | | 1 1 | | Grouped | | | | | | |
| end of 2 52 2.749;123 0 168;120 168;120 end of 2 end of 3 53 2.869;268 0 2.69;268 0 171;936 end of 3 end of 4 54 2.995;154 0 2.96;268 0 171;936 end of 3 end of 5 53 3.127;058 0 172;966 179;866 end of 6 end of 6 56 3.26;5277 0 3.26;527 0 183;991 end of 6 end of 7 57 3.410;117 0 3.42;01 183;991 end of 7 end of 8 58 3.56;1902 0 3.26;272 0 192;265 end of 7 end of 8 58 3.65;1902 0 3.82;912 197;024 end of 7 end of 1 60 3.87;682 0 2.20;603 end of 13 end of 12 62 4.245;538 0 2.21;603 end of 13 end of 12 62 4.245;538 0 2.21;94 2.21;194 end of 13 end of 12 65 4.83;692 0 | | 51 | | 0 | | | 164.400 | 164.400 | end of 1 | 1 |
| end of 3 53 2,869,268 0 2,899,154 00 171,936 end of 3 end of 4 54 2,999,154 00 2,999,154 00 177,856 end of 3 end of 5 55 3,127,058 0 3,127,058 0 179,868 end of 5 end of 6 56 3,265,277 0 3,859,172 0 188,991 188,991 end of 7 57 3,410,117 0 3,265,277 0 188,222 end of 7 end of 8 58 3,561,902 0 3,850,902 0 197,024 end of 8 end of 9 3,87,682 0 3,87,682 0 201,603 end of 1 end of 1 60 3,887,682 0 3,87,682 0 201,603 end of 12 end of 12 62 4,453,7489 0 4,245,538 0 221,134 end of 13 end of 13 65 4,437,489 0 4,437,489 0 221,194 end of 14 end of 15 66 5,007,952 0 5,005,455 <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<> | | | | | | | | | | |
| end of 5 55 3,127,058 0 3127,058 0 179,868 ond of 5 end of 6 56 3,265,277 0 32,852,77 0 183,991 end of 6 end of 7 57 3,410,117 0 3,450,177 0 188,222 end of 7 end of 8 58 3,551,902 0 3,561,902 0 197,024 end of 8 end of 8 end of 9 33,7582 0 32,052 0 197,024 end of 1 end of 1 end of 10 60 3,887,682 0 32,053 end of 1 end of 1 end of 11 61 4,062,406 0 206,603 201,603 end of 13 end of 12 62 4,245,538 0 221,135 221,135 end of 13 end of 13 63 4,437,489 0 221,135 221,134 end of 13 end of 14 64 4,638,692 0 4,245,538 0 221,134 end of 14 end of 13 65 4,849,601 0 4,837,499 0 221,134 <td>end of 3</td> <td></td> <td></td> <td>0</td> <td></td> <td>0</td> <td></td> <td></td> <td>end of 3</td> <td>3</td> | end of 3 | | | 0 | | 0 | | | end of 3 | 3 |
| end of 6 56 3265277 0 3265277 0 183.991 183.991 end of 7 end of 7 57 3410.117 0 340.117 0 183.292 end of 7 end of 8 58 3.561.902 0 3.561.902 0 192.565 end of 8 end of 10 0 3.887.682 0 3.201.972 0 3.720.972 0 197.024 end of 10 0 3.887.682 0 3.201.603 end of 10 end of 11 end of 11 61 4.062.406 0 4.062.406 0 206.603 206.305 end of 13 62 4.245.538 0 211.135 end of 12 end of 14 end of 13 63 4.437.489 0 216.097 216.097 end of 14 end of 14 64 4.638.692 0 221.194 end of 14 end of 15 65 4.849.601 0 6.82.04 end of 16 end of 16 66 5.070.692 0 6.82.04 end of 16 end of 17 67 5.302.466 0 70.857 70.657 end of 18 end of 19 69 5.800.193 0 5.8454.50 | end of 4 | 54 | 2,995,154 | 0 | 2,995,154 | 0 | 175,851 | 175,851 | end of 4 | 4 |
| end of 7 57 3,410,117 0 3,410,117 0 188,222 188,222 end of 7 end of 8 58 3,561,902 0 3,561,902 0 192,565 end of 7 end of 9 59 3,720,972 0 3,270,972 0 197,024 end of 9 end of 10 60 3,887,682 0 3,887,682 0 201,603 end of 11 end of 11 61 4,062,406 0 206,305 end of 11 end of 12 62 4,245,538 0 211,135 end of 12 end of 13 63 4,47,489 0 216,097 end of 13 end of 14 64 4,638,692 0 221,194 221,194 end of 13 end of 15 65 4,849,601 0 65,845 end of 15 end of 17 67 5,302,467 0 5,302,465 0 70,857 end of 19 68 5,545,450 0 73,210 end of 18 end of 19 68,800,193 0 5,864,55 0 73,210 end of 19 69 5,800,193 0 5,864,55 end of 19 end of 19 6,067,275 0 5, | end of 5 | 55 | 3,127,058 | 0 | 3,127,058 | 0 | 179,868 | 179,868 | end of 5 | 5 |
| end of 8 58 3,561,902 0 326,51902 0 192,565 192,565 end of 8 end of 9 59 3,720,972 0 3,720,72 0 197,024 end of 8 end of 10 60 3,887,682 0 3,887,682 0 201,603 201,603 end of 10 end of 11 61 4,062,406 0 4,062,406 0 206,305 208,305 end of 11 end of 12 4,245,538 0 4,245,538 0 211,135 end of 12 end of 13 63 4,437,489 0 4,245,538 0 211,135 end of 13 end of 13 63 4,437,489 0 4,211,135 end of 14 end of 14 64 4,58,692 0 221,194 end of 15 end of 15 65 4,849,601 0 68,204 end of 16 end of 17 67 5302,466 0 70,657 70,657 end of 17 end of 18 68 554,545.0 0 73,210 end of 18 end of 19 end of 19 | end of 6 | | 3,265,277 | 0 | 3,265,277 | | 183,991 | | | |
| end of 9 59 37,20,372 0 3720,372 0 197,024 197,024 end of 9 end of 10 60 3,887,682 0 3,887,682 0 3,887,682 end of 10 end of 11 61 4,062,406 0 4,062,406 0 206,603 201,603 end of 10 end of 12 62 4,245,538 0 4,245,538 0 211,135 end of 12 end of 13 63 4,437,489 0 4,437,489 0 221,097 end of 13 end of 14 64 4,638,692 0 4,439,498 0 221,194 221,194 end of 14 end of 15 65 4,849,601 0 65,845 end of 15 end of 15 end of 17 66 5,070,692 0 5,070,692 0 68,204 end of 18 end of 17 67 5,302,467 0 5,302,465 0 70,857 70,857 end of 18 end of 19 69 5,800,193 0 5,454,50 0 73,210 end of 19 end of 19 69 5,800,193 0 5,454,50 0 73,210 end of 19 end of 19 6,067,275 0 | | | | 1.5 | | | | | | |
| end of 10 60 3.887,682 0 3.887,682 0 201,603 end of 10 end of 11 61 4,062,406 0 4,062,406 0 206,305 end of 11 end of 12 62 4,245,538 0 4,245,538 0 211,135 end of 12 end of 13 63 4,437,489 0 4,437,489 0 211,097 216,097 end of 13 end of 14 64 4,638,662 0 4,837,489 0 4,837,489 0 4,837,489 end of 15 65 4,849,601 0 4,838,692 0 221,194 end of 16 end of 16 66 6,507,0592 0 6,82,04 end of 16 end of 17 67 5,302,465 0 70,657 70,657 end of 17 end of 18 68 5,545,450 0 73,210 78,210 end of 18 end of 19 69 5,800,193 0 5,78,655 78,865 end of 19 end of 19 6,67,275 0 6,067,275 0 3,074,332 3,074,332 | | | | | | | | | | |
| end of 11 61 4,062,406 0 4,062,406 0 206,305 end of 11 end of 12 62 4,245,538 0 4,245,538 0 211,135 end of 12 end of 13 63 4,437,489 0 4,437,489 0 216,097 end of 13 end of 14 64 4,638,692 0 4,838,692 0 221,194 end of 14 end of 15 65 4,849,601 0 65,845 end of 15 end of 15 end of 16 66 5,070,692 0 5,074,650 0 70,657 end of 18 end of 17 67 5,302,466 0 70,857 end of 18 end of 18 end of 19 69 5,800,193 0 5,845,400 0 75,865 end of 19 end of 19 69 5,800,193 0 5,801,939 0 75,865 end of 19 end of 20 0 6,067,275 0 6,067,275 0 3,074,332 a,074,332 | | | | | | | | | | |
| end of 12 62 4245538 0 4245538 0 211,135 211,135 end of 12 end of 13 63 4437,489 0 4437,489 0 216,097 end of 13 end of 14 64 4,638,692 0 4,837,489 0 221,194 end of 13 end of 15 65 4,849,601 0 4,838,692 0 221,194 end of 14 end of 15 66 5,070,692 0 6,8204 end of 15 end of 16 5 5,302,465 0 70,657 end of 16 end of 16 68,254,550 0 73,210 end of 18 end of 19 69 5,800,193 0 5,545,450 0 73,210 end of 19 69 5,800,193 0 5,745,450 0 73,210 end of 19 6,067,275 0 6,067,275 0 42,240 end of 20 end of 19 6,067,275 0 6,07,4322 3,074,332 9,074,332 9,074,332 | | | | | | - | | | | |
| end of 13 63 4,437,489 0 4,437,489 0 216,097 216,097 end of 13 end of 14 64 4,638,692 0 4,247,480 0 221,194 end of 13 end of 15 65 4,849,601 0 4,838,692 0 221,194 end of 15 end of 15 65 4,849,601 0 4,849,601 0 65,845 end of 15 end of 16 66 5,070,692 0 68,204 68,204 end of 16 end of 16 68 5,545,450 0 5,302,467 0 5,302,467 end of 18 68 5,545,450 0 73,210 end of 18 end of 19 69 5,800,193 0 5,845,565 75,865 end of 19 60,67,275 0 60,72,76 0 42,240 end of 19 60,67,275 0 60,72,73 0 21,6097 end of 19 60,67,275 0 60,72,73 0 3,074,332 | | | | | | | | | | |
| end of 14 64 4,633,692 0 4,838,692 0 221,194 221,194 end of 14 end of 15 65 4,849,601 0 4,849,601 0 65,045 66,845 end of 15 end of 16 66 5,070,692 0 5,070,692 0 68,204 68,204 end of 16 end of 17 67 5,302,467 0 5,302,465 0 70,657 rold 17 end of 18 68 5,545,450 0 73,210 rold 17 end of 19 end of 19 69 5,800,193 0 5,754,565 0 end of 19 end of 19 6,067,275 0 6,067,275 0 42,240 end of 20 end of 10 6,067,275 0 3,074,332 3,074,332 9,074,332 | | | | | | | | | | |
| end of 15 65 4,849,601 0 4,849,601 0 65,845 65,845 end of 15 end of 16 66 \$5,070,692 0 5,070,692 0 68,204 end of 16 end of 17 7 5,302,467 0 5,302,466 0 770,657 end of 17 end of 18 68 \$5,545,450 0 \$5,545,450 0 \$73,210 73,210 73,210 end of 18 end of 19 69 \$5,800,193 0 \$5,865 100 75,865 end of 19 end of 19 60,67,275 0 60,67,275 0 3,074,332 3,074,332 | | | | | | | | | | |
| end of 16 66 5,070,692 0 68,204 68,204 end of 16 end of 17 67 5,302,467 0 5,302,466 0 70,657 end of 18 end of 18 68 5,545,450 0 5,324,65 0 73,210 end of 18 end of 19 69 5,800,193 0 5,865, 455 0 75,865 end of 19 end of 20 6,067,275 0 6,067,275 0 42,240 end of 20 | | | | - | | | | | | |
| end of 17 67 5,302,467 0 5,302,466 0 70,657 end of 17 end of 18 65 65,545,450 0 73,210 end of 18 end of 19 69 5,800,193 0 5,845,450 0 73,210 end of 18 end of 19 69 5,800,193 0 5,865,57 75,865 r64 of 19 end of 20 6,067,275 0 6,067,276 0 42,240 end of 19 end of 20 0 0 3,074,832 3,074,332 end of 20 | | | | | | | | | | |
| end of 18 68 5,545,450 0 5,545,450 0 73,210 73,210 end of 18 end of 19 69 5,800,193 0 5,865 mod of 19 end of 19 end of 20 70 6,067,275 0 6,067,275 0 end of 20 0 0 3,074,332 3,074,332 3,074,332 a | | | | | | | | | | |
| end of 19 69 5,800,193 0 5,800,193 0 77,865 78,865 end of 19 end of 20 70 6,067,275 0 6,067,276 0 42,240 42,240 end of 20 0 3,074,332 3,074,332 | | | | 0 | | | | | | |
| 0 0 3,074,332 3,074,332 | end of 19 | 69 | | 0 | | | | | | |
| | end of 20 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 42,240 | 42,240 | end of 20 | 20 |
| Orange backgrounds indicate hypothetical returns | | | | 0 | | 0 | 3,074,332 | 3,074,332 | | |
| | Orange b | ackgrounds ind | dicate hypoth | etical returns | 6 | | | | | |

Step 5: Display Options: Click on the green Display Option button underneath the Structured Income Planning subheading.

| | | | | | | | | | | YOUR CASE LIST SETTINGS | HELP |
|---------------------------|----------------|------------------------|----------------|------------------------|-------------------------|-----------------------|--------------------|------------------------|---------------------------------|-------------------------|------|
| - | | | | | | | | | | PREPARED BY: | |
| | | | | | | | | | | INITIAL PLAN DATE: | |
| CLIENT DASHBO | ARD STR | JCTURED INCO | ME PLANNING | CASH FL | OW AND TAX AI | OVISOR ASS | SET ALLOCATIO | ON AND NET W | ORTH GRAPHS REPORTS TOOLS | REVISED PLAN DATE: | |
| Struct | ured l | ncom | e Plar | nina | | | | | | | |
| | | | | | | | | | | | |
| Edit Save C | Cancel Add | Account Ad | d Income A | dd Inc Tax | Add Target | dit or Add Scen | iario Displa | y Options | 9 | • | |
| | | | | | | | | | | | |
| Scenario Con | idense All and | Uncondense | All Function | | | | ~ | | | | |
| | 7 | | 3 | ř | | | | | | | |
| | | Acco | ounts 🖉 | | | | | | | | |
| Planning Horizon | 20 years 🗸 | Gro | ouped | | | Incomes ¹² | | | | | |
| Year | | Account | Income | Accounts Total | Planned Distribution | Grouped | Total Income | Year | | | |
| net return | 50 | 1000000000 | Grouped | 121222000 | 2.100.000 | | | | | | |
| initial amount bonus % | | 2,525,000 | Grouped | 2,525,000 | Subtotal of account | | | | | | |
| w/bonus | | 2,525,000 | Grouped | 2,525,000 | incomes | | | | | | |
| end of 1 | 51 | 2,634,452 | 0 | 2,634,452 | 0 | 164,400 | 164,400 | end of 1 | | | |
| end of 2 | 52 | 2,749,123 | 0 | 2,749,123 | 0 | 168,120 | 168,120 | end of 2 | | | |
| end of 3 | 53 | 2,869,268 | 0 | 2,869,268 | 0 | 171,936 | 171,936 | end of 3 | | | |
| end of 4 end of 5 | 54 55 | 2,995,154 | 0 | 2,995,154 | 0 | 175,851 179,868 | 175,851 179,868 | end of 4 end of 5 | | | |
| end of 5 end of 6 | 55 | 3,127,058 3,265,277 | 0 | 3,127,058 3,265,277 | 0 | 1/9,868 | 183,991 | end of 5 end of 6 | | | |
| end of 7 | 57 | 3,410,117 | 0 | 3,203,277 | 0 | 188,222 | 188,222 | end of 7 | | | |
| end of 8 | 58 | 3,561,902 | 0 | 3,561,902 | 0 | 192,565 | 192,565 | end of 8 | | | |
| end of 9 | 59 | 3,720,972 | 0 | 3,720,972 | 0 | 197,024 | 197,024 | end of 9 | | | |
| end of 10 | 60 | 3,887,682 | 0 | 3,887,682 | 0 | 201,603 | 201,603 | end of 10 | | | |
| end of 11 | 61 | 4,062,406 | 0 | 4,062,406 | 0 | 206,305 | 206,305 | end of 11 | | | |
| end of 12 | 62 | 4,245,538 | 0 | 4,245,538 | 0 | 211,135 | 211,135 | end of 12 | | | |
| end of 13 end of 14 | 63 64 | 4,437,489 4,638,692 | 0 | 4,437,489 4,638,692 | 0 | 216,097 221,194 | 216,097 | end of 13 end of 14 | | | |
| end of 14 end of 15 | 65 | 4,638,692 4,849,601 | 0 | 4,638,692 4,849,601 | 0 | 65,845 | 221,194 65,845 | end of 14 end of 15 | | | |
| end of 16 | 66 | 5,070,692 | 0 | 5,070,692 | 0 | 68,204 | 68,204 | end of 16 | | | |
| end of 17 | 67 | 5,302,467 | 0 | 5,302,466 | 0 | 70,657 | 70,657 | end of 17 | | | |
| end of 18 | 68 | 5,545,450 | 0 | 5,545,450 | 0 | 73,210 | 73,210 | end of 18 | | | |
| end of 19 | 69 | 5,800,193 | 0 | 5,800,193 | 0 | 75,865 | 75,865 | end of 19 | | | |
| end of 20 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 42,240 | 42,240 | end of 20 | | | |
| | | | 0 | | 0 | 3,074,332 | 3,074,332 | | | | |
| Orange ba | ackgrounds in | dicate hypoth | etical returns | | | | | | | | |

Step 6: Uncondense All: Click on the green Uncondense All button located in the Account and Income Grouping table.

| Column Display Options | View RMD Checks Hide Income Riders View | / Death Benefit | View % Distr | ibution View | Comparison | View Tax R | ates View Ca | lendar Years | | |
|----------------------------------|--|------------------|------------------|--------------|------------|------------|---------------|----------------------------|-------|------|
| | | | | | | | | | | — |
| | Account and Income Gro | uping | | | | | | Group Setup | | |
| | Accounts | | | Accounts | | | | | | |
| | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | | Title | | Color | |
| Checkings/Savings Account | ۲ | 0 | 0 | 0 | 0 | Group 1 | Accounts | | | Sel |
| Individual Roth IRA | ۲ | 0 | 0 | 0 | 0 | Group 2 | | | | Sel |
| 401(k) | ۲ | 0 | 0 | 0 | 0 | Group 3 | | | | Sel |
| | | | | | | Group 4 | | | | Sel |
| Wages | Incomes | 0 | \bigcirc | 0 | \bigcirc | Group 5 | | | | Sel |
| SS | | 0 | 0 | 0 | 0 | | | Incomes | | |
| VRBO | | 0 | 0 | 0 | 0 | | Title | incomes | Color | |
| | | 0 | 0 | 0 | 0 | | Incomes | | | Sel |
| Account or income groups must t | e created in the sequential order from left to right | as they appear | in the Income A | Plan. | | Group 2 | | | | Sel |
| You may have to re-order account | using the Edit Scenario function to achieve the se | equence you wa | int for your acc | ount/income | groups. | Group 3 | | | 1 | Sel |
| Reordering or adding accounts or | acomes on the Edit Scenario function requires the | it the above gro | up information | be reset. | | Group 4 | | | | Sel |
| | | | | | | Group 5 | | | | Sel |
| Reset Condense All Unconde | ense All | | | | | | | | | |
| | | | | | | Reset T | itle / Colors | opy Setup To All Scenarios | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Return With Grouping Return Wit | hout Grouping | | | | | | | | | |
| | | | | | | | | | | أدعم |

Step 7: Structured Income Planning Page: The accounts and income columns have been individualized out.

| C. | | | | | | | | | | | | | | YOUR | R CASE LIST SETTINGS | HELP SIGN (|
|-----------------------------|----------------|--------------------|----------------|------------------------|-------------|--------------------|--------------------|------------------------|--------------|--------------------|-----------------------|------------------|--------------------|------------------------|----------------------|-------------|
| | | | | | | | | | | | 1 | | | | PREPARED BY: | |
| | | | | | | | | | | | | | | | INITIAL PLAN DATE: | |
| CLIENT DASHBO | DARD STRU | ICTURED INCO | ME PLANNING | CASH FL | W AND TAX A | DVISOR A | SSET ALLOCA | TION AND NET | WORTH C | RAPHS R | EPOR <mark>S</mark> T | OOLS | | | REVISED PLAN DATE: | |
| 21 | | | DI | | | | | | | | | | | | | |
| Struct | ured II | ncom | e Plar | nning | | | | | | | | | | | | |
| Edit Save C | Cancel Add A | Account Add | d income A | dd Inc Tax | dd Target | | enario Disp | lay Options | | | | | | | | |
| | | | 10 | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Cenario Con | ndense All and | Uncondonco | All Eurotion | | | | ~ | | | | | | | | | |
| Con | idense All and | Uncondense | All Function | | | | * | | | | | | | | | |
| | 1 | | | | | | × | í l | | | | | | | | |
| | | | | Acco | unts | | ×. | | | | | | | | | |
| lanning | 20 years ∨ | Checkin | gs/Savings | | | | 1000 | | | | | JK. | | | | |
| lorizon | 20 jears | | count | Individu | al Roth IRA | 4 | 01(k) | | | | Incomes | ~ | | | | |
| Year | | Account | Income | Account | Income | Account | Income | Accounts | Planned | | SS | VRBO | Total | Year | 1 | |
| 0.0000 | | SPIRE STREET | income | THREE CONTRACTOR | income | | Contraction of the | Total | Distribution | Wages | 55 | VRDU | Income | Tedi | - | |
| net return nitial amount | 50 | 0.00 % | | 5.20 % 1,500,000 | | 3.70 % 850,000 | IRA | 2,525,000 | Subtotal | Manago | Manage | Manage | | | | |
| bonus % | | 0.00 % | | 0.00 % | | 0.00 % | | 2,525,000 | of account | Infl Factor | Infl Factor | Infl Factor | | | | |
| w/bonus | | 175,000 | Manage | 1,500,000 | Manage | 850,000 | Manage | 2,525,000 | incomes | 2.00 % | 2.50 % | 5.00 % | | | | |
| end of 1 | 51 | 175,002 | 0 | 1,578,000 | 0 | 881,450 | 0 | 2,634,452 | 0 | 150,000 | 0 | 14,400 | 164,400 | end of 1 | 1 | |
| end of 2 | 52 | 175,004 | 0 | 1,660,056 | 0 | 914,064 | 0 | 2,749,123 | 0 | 153,000 | 0 | 15,120 | 168,120 | end of 2 | | |
| end of 3 end of 4 | 53 54 | 175,005 175,007 | 0 | 1,746,379 1,837,191 | 0 | 947,884 982,956 | 0 | 2,869,268 2,995,154 | 0 | 156,060 159,181 | 0 | 15,876 16,670 | 171,936 175.851 | end of 3 end of 4 | | |
| end of 5 | 55 | 175,007 | 0 | 1,037,191 | 0 | 1,019,325 | 0 | 3,127,058 | 0 | 162,365 | 0 | 17,503 | 179,868 | end of 4 | | |
| end of 6 | 56 | 175,010 | 0 | 2.033.227 | 0 | 1,057,040 | 0 | 3,265,277 | 0 | 165,612 | 0 | 18,378 | 183,991 | end of 6 | | |
| end of 7 | 57 | 175,012 | 0 | 2,138,955 | 0 | 1,096,150 | 0 | 3,410,117 | 0 | 168,924 | 0 | 19,297 | 188,222 | end of 7 | | |
| end of 8 | 58 | 175,014 | 0 | 2,250,180 | 0 | 1,136,708 | 0 | 3,561,902 | 0 | 172,303 | 0 | 20,262 | 192,565 | end of 8 | | |
| end of 9 | 59 | 175,016 | 0 | 2,367,190 | 0 | 1,178,766 | 0 | 3,720,972 | 0 | 175,749 | 0 | 21,275 | 197,024 | end of 9 | | |
| end of 10 end of 11 | 60 61 | 175,018 175,019 | 0 | 2,490,284 2,619,779 | 0 | 1,222,380 | 0 | 3,887,682 4,062,406 | 0 | 179,264 182,849 | 0 | 22,339 23,456 | 201,603 206,305 | end of 10 end of 11 | - | |
| end of 12 | 62 | 175,019 | 0 | 2,756,008 | 0 | 1,314,509 | 0 | 4,062,406 | | 186,506 | 0 | 23,450 | 206,305 | end of 11 end of 12 | | |
| end of 13 | 63 | 175,023 | 0 | 2,899,320 | 0 | 1,363,146 | 0 | 4,437,489 | 0 | 190,236 | 0 | 25,860 | 216,097 | end of 13 | | |
| end of 14 | 64 | 175,024 | 0 | 3,050,085 | 0 | 1,413,582 | 0 | 4,638,692 | 0 | 194,041 | 0 | 27,153 | 221,194 | end of 14 | | |
| end of 15 | 65 | 175,026 | 0 | 3,208,690 | 0 | 1,465,885 | 0 | 4,849,601 | 0 | 0 | 37,334 | 28,511 | 65,845 | end of 15 | ļ | |
| end of 16 | 66 | 175,028 | 0 | 3,375,542 | 0 | 1,520,123 | 0 | 5,070,692 | 0 | 0 | 38,267 | 29,937 | 68,204 | end of 16 | | |
| end of 17 | 67 68 | 175,030 | 0 | 3,551,070 | 0 | 1,576,367 | 0 | 5,302,466 | 0 | 0 | 39,224 | 31,433 | 70,657 | end of 17 | | |
| end of 18 end of 19 | 69 | 175,032 175,033 | 0 | 3,735,726 3,929,984 | 0 | 1,634,693 | 0 | 5,545,450 5,800,193 | 0 | 0 | 40,205 41,210 | 33,005 34,655 | 73,210 75,865 | end of 18 end of 19 | | |
| end of 20 | 70 | 175,035 | 0 | 4,134,343 | 0 | 1,757,898 | 0 | 6,067,276 | 0 | 0 | 42,240 | 0 | 42.240 | end of 20 | | |
| | | | 0 | | 0 | .,, | 0 | 2,2 37 127 0 | 0 | 2,396,090 | 238,480 | 439,761 | 3,074,332 | | | |
| Orange by | ackgrounds inc | licate hypoth | atical returns | | | | | | | | | | | | | |

Step 8: Accounts Diagonal Carrot Arrows: In the Accounts table cell, click on the diagonal carrot arrow located in the upper right-hand corner of the cell.

| CLIENT DASHBO | APD STP | | | | OW AND TAX A | | SSET ALLO VAT | TION AND NET | WORTH L G | | | 2001 8 | | | PREPARED BY: INITIAL PLAN DATE: | |
|-------------------------------------|---------------|--------------------|---------------|------------------------|--------------|------------------------|-----------------|------------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------|------------------------|------------------------------------|--|
| | | | | | SW AND TAX A | DVISOR A | SSET ALLO A | TION AND NET | WORTH C | NAPHS K | EPORIS I | OOLS | | | REVISED PLAN DATE: | |
| Struct | ured li | ncom | e Plar | nina | | | | | | | | | | | | |
| | Cancel Add A | | | | Add Target | Edit or Add Sc | enario D so | lay Options | | | | | | | | |
| يا الخنييا ال | فندنيا لتغذيف | فنتك التستخف | يتنا المتخدين | يا المناطق | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| cenario Con | dense All and | Uncondense | All Function | | | | ~ | | | | | | | | | |
| | | | | | | | • | | | | | | | | | |
| | | | | | | | 7 th | | | | | | | | | |
| | | | | Acco | unts | | 1.526 | | | _ | | | | | | |
| lanning orizon | 20 years 🗸 | | gs/Savings | Individu | al Roth IRA | 40 | 01(k) | | | | Incomes | × | | | | |
| 0112011 | | | count | , | | | 14 | Accounts | Planned | | | | Total | | í. | |
| Year | | Account | Income | Account | Income | Account | Income | Total | Distribution | Wages | SS | VRBO | Income | Year | | |
| net return | 50 | 0.00 % | | 5.20 % | | 3.70 % | IRA | | | | | | | | | |
| nitial amount | | 175,000 0.00 % | | 1,500,000 0.00 % | | 850,000 0.00 % | | 2,525,000 | Subtotal | Manage Infl Factor | Manage Infl Factor | Manage Infl Factor | | | 1 | |
| bonus % w/bonus | | 175,000 | Manage | 1,500,000 | Manage | 850,000 | Manage | 2,525,000 | of account incomes | 2.00 % | 2.50 % | 5.00 % | | | 1 | |
| end of 1 | 51 | 175,002 | 0 | 1,578,000 | 0 | 881,450 | Manage 0 | 2,634,452 | 0 | 150,000 | 0 | 14,400 | 164,400 | end of 1 | 1 | |
| end of 2 | 52 | 175,004 | 0 | 1,660,056 | 0 | 914,064 | 0 | 2,749,123 | 0 | 153,000 | 0 | 15,120 | 168,120 | end of 2 | 1 | |
| end of 3 | 53 | 175,005 | 0 | 1,746,379 | 0 | 947,884 | 0 | 2,869,268 | 0 | 156,060 | 0 | 15,876 | 171,936 | end of 3 | 1 | |
| end of 4 | 54 | 175,007 | 0 | 1,837,191 | 0 | 982,956 | 0 | 2,995,154 | 0 | 159,181 | 0 | 16,670 | 175,851 | end of 4 | 1 | |
| end of 5 | 55 | 175,009 | 0 | 1,932,725 | 0 | 1,019,325 | 0 | 3,127,058 | 0 | 162,365 | 0 | 17,503 | 179,868 | end of 5 | l | |
| end of 6 | 56 | 175,010 | 0 | 2,033,227 | 0 | 1,057,040 | 0 | 3,265,277 | 0 | 165,612 | 0 | 18,378 | 183,991 | end of 6 | 1 | |
| end of 7 end of 8 | 57 58 | 175,012 175,014 | 0 | 2,138,955 2,250,180 | 0 | 1,096,150 1,136,708 | 0 | 3,410,117 3,561,902 | 0 | 168,924 172,303 | 0 | 19,297 20,262 | 188,222 192,565 | end of 7 end of 8 | | |
| end of 9 | 59 | 175,014 | 0 | 2,250,180 | 0 | 1,178,766 | 0 | 3,301,902 | 0 | 175,749 | 0 | 21,275 | 192,505 | end of 9 | 1 | |
| end of 10 | 60 | 175,018 | 0 | 2,490,284 | 0 | 1,222,380 | 0 | 3,887,682 | o o | 179,264 | 0 | 22,339 | 201,603 | end of 10 | 1 | |
| end of 11 | 61 | 175,019 | 0 | 2,619,779 | 0 | 1,267,608 | 0 | 4,062,406 | 0 | 182,849 | 0 | 23,456 | 206,305 | end of 11 | | |
| end of 12 | 62 | 175,021 | 0 | 2,756,008 | 0 | 1,314,509 | 0 | 4,245,538 | 0 | 186,506 | 0 | 24,629 | 211,135 | end of 12 | | |
| end of 13 | 63 | 175,023 | 0 | 2,899,320 | 0 | 1,363,146 | 0 | 4,437,489 | 0 | 190,236 | 0 | 25,860 | 216,097 | end of 13 | | |
| end of 14 | 64 | 175,024 | 0 | 3,050,085 | 0 | 1,413,582 | 0 | 4,638,692 | 0 | 194,041 | 0 | 27,153 | 221,194 | end of 14 | | |
| end of 15 | 65 | 175,026 | 0 | 3,208,690 | 0 | 1,465,885 | 0 | 4,849,601 | 0 | 0 | 37,334 | 28,511 | 65,845 | end of 15 | | |
| end of 16 | 66 | 175,028 | 0 | 3,375,542 | 0 | 1,520,123 | 0 | 5,070,692 | 0 | 0 | 38,267 | 29,937 | 68,204 | end of 16 | | |
| end of 17 | 67 68 | 175,030 175.032 | 0 | 3,551,070 3,735,726 | 0 | 1,576,367 1,634,693 | 0 | 5,302,466 5,545,450 | 0 | 0 | 39,224 40,205 | 31,433 33,005 | 70,657 73,210 | end of 17 end of 18 | | |
| and of 19 | 69 | 175,032 | 0 | 3,735,726 | 0 | 1,634,693 | 0 | 5,545,450 | 0 | 0 | 40,205 | 33,005 | 75,865 | end of 18 end of 19 | | |
| end of 18 end of 19 | | | | 0,020,004 | 0 | | 0 | | | | | | | | í. | |
| end of 18 end of 19 end of 20 | 70 | 175,035 | 0 | 4,134,343 | 0 | 1,757,898 | 0 | 6,067,276 | 0 | 0 | 42.240 | 0 | 42,240 | end of 20 | 1 | |

Step 9: Incomes Diagonal Carrots Arrows: In the Incomes table cell, click on the diagonal carrot arrow located in the upper right-hand corner of the cell.

| | | | | | | | | | | | | YOUR CASE LIST SETTINGS | HEL |
|------------------------|----------------|------------------------|----------------|------------------------|-------------------------|-----------------------|-----------------------|-----------------------|--------------------|------------------------|-------------|-------------------------|-----|
| | | | | | | | | 1 | | | | PREPARED BY: | |
| | | | | | | | | | | | | INITIAL PLAN DATE: | |
| CLIENT DASHBO | DARD STRU | JCTURED INCO | ME PLANNING | CASH FL | OW AND TAX A | DVISOR A | SSET ALLOCAT | TION AND NET | WORTH G | RAPHS F | PORTS TOOLS | REVISED PLAN DATE: | |
| Struct | ured li | ncom | e Plar | nnina | | | | | | | | | |
| Edit Dynami | | | | | | | | | | | | | |
| Con Oynami | e mode | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Scenario Cor | ndense All and | Uncondense | All Function | | | | ~ | | | | | | |
| | | | | | | | | | | | | | |
| | | Acco | unts 🖉 | | | | | - + | | | | | |
| Planning | 20 years 🗸 | | 10000 | | 1 | | (prostolic) | 34 | | | | | |
| Horizon | | Gro | ouped | | | | Incomes | - | | | | | |
| Year | | Account | Income | Accounts Total | Planned Distribution | Wages | SS | VRBO | Total Income | Year | | | |
| net return | 50 | 114110-1010 | Grouped | | | Wayes | | | income | | | | |
| initial amount | | 2,525,000 | One | 2,525,000 | Subtotal | Infl Contac | Infl Control | Infl Faster | | | | | |
| bonus % w/bonus | | 2,525,000 | Grouped | 2,525,000 | of account incomes | Infl Factor 2.00 % | Infl Factor 2.50 % | Infl Factor 5.00 % | | | | | |
| end of 1 | 51 | 2,634,452 | 0 | 2,634,452 | 0 | 150,000 | 2.00 % | 14,400 | 164,400 | end of 1 | | | |
| end of 2 | 52 | 2,749,123 | 0 | 2,749,123 | 0 | 153,000 | 0 | 15,120 | 168,120 | end of 2 | | | |
| end of 3 | 53 | 2,869,268 | 0 | 2,869,268 | 0 | 156,060 | 0 | 15,876 | 171,936 | end of 3 | | | |
| end of 4 | 54 | 2,995,154 | 0 | 2,995,154 | 0 | 159,181 | 0 | 16,670 | 175,851 | end of 4 | | | |
| end of 5 | 55 | 3,127,058 | 0 | 3,127,058 | 0 | 162,365 | 0 | 17,503 | 179,868 | end of 5 | | | |
| end of 6 | 56 | 3,265,277 | 0 | 3,265,277 | 0 | 165,612 | 0 | 18,378 | 183,991 | end of 6 | | | |
| end of 7 | 57 | 3,410,117 | 0 | 3,410,117 | 0 | 168,924 | 0 | 19,297 | 188,222 | end of 7 | | | |
| end of 8 | 58 | 3,561,902 | 0 | 3,561,902 | 0 | 172,303 | 0 | 20,262 | 192,565 | end of 8 | | | |
| end of 9 | 59 | 3,720,972 | 0 | 3,720,972 | 0 | 175,749 | 0 | 21,275 | 197,024 | end of 9 | | | |
| end of 10 | 60 | 3,887,682 | 0 | 3,887,682 | 0 | 179,264 | 0 | 22,339 | 201,603 | end of 10 | | | |
| end of 11 | 61 | 4,062,406 | 0 | 4,062,406 | 0 | 182,849 | 0 | 23,456 | 206,305 | end of 11 | | | |
| end of 12 end of 13 | 62 63 | 4,245,538 4,437,489 | 0 | 4,245,538 | 0 | 186,506 | 0 | 24,629 | 211,135 216,097 | end of 12 end of 13 | | | |
| end of 13 end of 14 | 64 | 4,437,489 4,638,692 | 0 | 4,437,489 4,638,692 | 0 | 190,236 194,041 | 0 | 25,860 27,153 | 216,097 | end of 13 end of 14 | | | |
| end of 14 end of 15 | 65 | 4,638,692 | 0 | 4,638,692 | 0 | 194,041 | 37,334 | 27,153 | 65,845 | end of 14 end of 15 | | | |
| end of 16 | 66 | 5,070,692 | 0 | 5,070,692 | 0 | 0 | 38,267 | 29,937 | 68,204 | end of 15 end of 16 | | | |
| end of 17 | 67 | 5,302,467 | 0 | 5,302,466 | 0 | 0 | 39,224 | 31,433 | 70,657 | end of 17 | | | |
| end of 18 | 68 | 5,545,450 | 0 | 5,545,450 | 0 | 0 | 40,205 | 33,005 | 73,210 | end of 18 | | | |
| end of 19 | 69 | 5,800,193 | 0 | 5,800,193 | 0 | 0 | 41,210 | 34,655 | 75,865 | end of 19 | | | |
| end of 20 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 0 | 42,240 | 0 | 42,240 | end of 20 | | | |
| | | | 0 | | 0 | 2,396,090 | 238,480 | 439,761 | 3,074,332 | | | | |
| | | | etical returns | | | | | | | | | | |

Step 10: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

| LIENT D | ASHBO | OARD STRU | CTURED INCO | ME PLANNING | CASH FL | OW AND TAX A | OVISOR ASS | SET ALLOCATIO | ON AND NET W |
|------------------|----------|----------------|------------------------|----------------|---------------------|-------------------------|--------------------|--------------------|----------------------|
| | | | | - | | | | | |
| stru | ıct | ured In | ncom | e Plar | ning | | | | |
| dit Sc | | | | | | dd Target | dit or Add Scer | ario Displa | y Options |
| | | | Add | | | tud Turget | an of Add occi | iuno biopia | y opnons |
| - 4 | | | | | | | | | |
| cenario | Con | ndense All and | Uncondonac | All Eurotian | | | | ~ | |
| - Children | COI | nuense All anu | oncondense | All Function | | | | * | |
| | | 1 | | | | | | | |
| | | | Acco | unts - | | | | | |
| anning orizon | | 20 years 🗸 | Gro | ouped | | | Incomes | | |
| 5112011 | | | | Jahoa | | | linoolineo | | |
| Ye | r | | Account | Income | Accounts Total | Planned Distribution | Grouped | Total Income | Year |
| net re | um | 50 | | Grouped | Total | Distribution | | income | |
| nitial a | | | 2,525,000 | | 2,525,000 | Subtotal | | | |
| bonu | | | | Grouped | 0 | of account | | | |
| w/bo end | | 61 | 2,525,000 | 0 | 2,525,000 2,634,452 | incomes | 164.400 | 164.400 | and of 1 |
| end | | 51 52 | 2,634,452 2,749,123 | 0 | 2,034,452 2,749,123 | 0 | 164,400 168,120 | 164,400 168,120 | end of 1 end of 2 |
| end | | 53 | 2.869.268 | 0 | 2.869.268 | ő | 171,936 | 171,936 | end of 3 |
| end | | 54 | 2,995,154 | 0 | 2,995,154 | ő | 175,851 | 175,851 | end of 4 |
| end | | 55 | 3,127,058 | 0 | 3,127,058 | 0 | 179,868 | 179.868 | end of 5 |
| end | f 6 | 56 | 3,265,277 | 0 | 3,265,277 | 0 | 183,991 | 183,991 | end of 6 |
| end | f 7 | 57 | 3,410,117 | 0 | 3,410,117 | 0 | 188,222 | 188,222 | end of 7 |
| end | f 8 | 58 | 3,561,902 | 0 | 3,561,902 | 0 | 192,565 | 192,565 | end of 8 |
| end | f9 | 59 | 3,720,972 | 0 | 3,720,972 | 0 | 197,024 | 197,024 | end of 9 |
| end d | 10 | 60 | 3,887,682 | 0 | 3,887,682 | 0 | 201,603 | 201,603 | end of 10 |
| end of | | 61 | 4,062,406 | 0 | 4,062,406 | 0 | 206,305 | 206,305 | end of 11 |
| end of | | 62 | 4,245,538 | 0 | 4,245,538 | 0 | 211,135 | 211,135 | end of 12 |
| end of | | 63 | 4,437,489 | 0 | 4,437,489 | 0 | 216,097 | 216,097 | end of 13 |
| end of | | 64 | 4,638,692 | 0 | 4,638,692 | 0 | 221,194 | 221,194 | end of 14 |
| end of | | 65 | 4,849,601 | 0 | 4,849,601 | 0 | 65,845 | 65,845 | end of 15 |
| end of | | 66 | 5,070,692 | 0 | 5,070,692 | 0 | 68,204 | 68,204 | end of 16 |
| end of | | 67 | 5,302,467 | 0 | 5,302,466 | 0 | 70,657 | 70,657 | end of 17 |
| end of | | 68 | 5,545,450 | 0 | 5,545,450 | 0 | 73,210 | 73,210 | end of 18 |
| end of | | 69 | 5,800,193 | 0 | 5,800,193 | 0 | 75,865 | 75,865 | end of 19 |
| end of | 120 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 42,240 | 42,240 | end of 20 |
| | | | | 0 | | 0 | 3,074,332 | 3,074,332 | |
| | a a a la | ackarounde ind | licate hypoth | etical returns | | | | | |

Step 11: 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 O |
|------------------------|----------------|------------------------|---------------------|------------------------|-------------------------|-----------------------|--------------------|------------------------|---|
| LIENT DASHBO | DARD STRU | JCTURED INCO | ME PLANNING | CASH FL | OW AND TAX A | DVISOR ASS | SET ALLOCATIO | ON AND NET W | PREPARED BY: INITIAL PLAN DATE: RTH GRAPHS REPORTS TOOLS REVISED PLAN DATE: |
| Struct | ured li | ncom | e Plar | nina | | | | | |
| | | COIII | C I Iui | inning | | | | | |
| dit Dynamie | c Mode | | | | | | | | |
| • | | | | | | | | | |
| enario Con | ndense All and | Uncondense | All Euroction | | | | ~ | | |
| CON | idense All and | oncondense | AirPariction | | | | | | |
| | | Acco | unts ⊭ [≫] | | | | | | |
| nning izon | 20 years v | Gro | ouped | | | Incomes ^{⊮™} | | | |
| Year | 10000 | Account | Income | Accounts Total | Planned Distribution | Grouped | Total Income | Year | |
| net return | 50 | | Grouped | | | | | | |
| tial amount bonus % | | 2,525,000 | Grouped | 2,525,000 0 | Subtotal of account | | | | |
| w/bonus | | 2,525,000 | Gloupeu | 2,525,000 | incomes | | | | |
| end of 1 | 51 | 2,634,452 | 0 | 2,634,452 | 0 | 164,400 | 164,400 | end of 1 | |
| end of 2 | 52 | 2,749,123 | 0 | 2,749,123 | 0 | 168,120 | 168,120 | end of 2 | |
| end of 3 | 53 | 2,869,268 | 0 | 2,869,268 | 0 | 171,936 | 171,936 | end of 3 | |
| end of 4 | 54 | 2,995,154 | 0 | 2,995,154 | 0 | 175,851 | 175,851 | end of 4 | |
| end of 5 | 55 56 | 3,127,058 | 0 | 3,127,058 | 0 | 179,868 | 179,868 183,991 | end of 5 | |
| end of 6 end of 7 | 57 | 3,265,277 3,410,117 | 0 | 3,265,277 3,410,117 | 0 | 183,991 188,222 | 188,222 | end of 6 end of 7 | |
| end of 8 | 58 | 3,561,902 | 0 | 3,561,902 | ő | 192,565 | 192,565 | end of 8 | |
| end of 9 | 59 | 3,720,972 | 0 | 3,720,972 | 0 | 197,024 | 197,024 | end of 9 | |
| end of 10 | 60 | 3,887,682 | 0 | 3,887,682 | 0 | 201,603 | 201,603 | end of 10 | |
| end of 11 | 61 | 4,062,406 | 0 | 4,062,406 | 0 | 206,305 | 206,305 | end of 11 | |
| end of 12 | 62 | 4,245,538 | 0 | 4,245,538 | 0 | 211,135 | 211,135 | end of 12 | |
| end of 13 | 63 | 4,437,489 | 0 | 4,437,489 | 0 | 216,097 | 216,097 | end of 13 | |
| end of 14 end of 15 | 64 65 | 4,638,692 4,849,601 | 0 | 4,638,692 4,849,601 | 0 | 221,194 65,845 | 221,194 65,845 | end of 14 end of 15 | |
| end of 15 end of 16 | 66 | 5,070,692 | 0 | 5,070,692 | 0 | 68,204 | 68,204 | end of 15 end of 16 | |
| end of 17 | 67 | 5,302,467 | 0 | 5,302,466 | 0 | 70,657 | 70,657 | end of 16 end of 17 | |
| end of 18 | 68 | 5,545,450 | 0 | 5,545,450 | ő | 73,210 | 73,210 | end of 18 | |
| end of 19 | 69 | 5,800,193 | 0 | 5,800,193 | Ő | 75,865 | 75,865 | end of 19 | |
| end of 20 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 42,240 | 42,240 | end of 20 | |
| | | | 0 | | 0 | 3,074,332 | 3,074,332 | | |
| | | | etical returns | | | | | | |

Step 12: 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 I | IELP SIGN |
|------------------------|--------------|------------------------|----------------|------------------------|---------------|------------------|------------------|------------------------|------------------|----------|---------------------------|-----------|
| | | | | | | | | | | | PREPARED BY: | |
| | | | | | | | | | | | INITIAL PLAN DATE: | |
| CLIENT DASHBOA | ARD STR | UCTURED INCO | ME PLANNING | CASH FL | OW AND TAX AI | OVISOR ASS | SET ALLOCATIO | ON AND NET W | RTH GRAPHS REPOR | TS TOOLS | REVISED PLAN DATE: | |
| Ctructu | urod I | noom | | ning | | | | | | | | |
| Structu | irea i | ncom | e Plai | ining | | | | | | | | |
| Edit Save Ca | ancel Add | Account Add | d Income A | dd Inc Tax 🖌 | Add Target E | | nario Displa | y Options | | | | |
| | A | | | | | | | | | | | |
| | г | | | | | | | | | | | |
| Scenario Conc | nse All and | Uncondense | All Function | | | | ~ | | | | | |
| | | | | | | | | | | | | |
| | | Acco | unts 🖉 | | | | | | | | | |
| | | | | | | _ | | | | | | |
| Planning Horizon | Dyears ∨ | Gro | ouped | | | Incomes | | | | | | |
| | - | | <u></u> | Accounts | Planned | | Total | | | | | |
| Year | | Account | Income | Total | Distribution | Grouped | Income | Year | | | | |
| net return | 50 | | Grouped | ne contrata da | | | | | | | | |
| initial amount | | 2,525,000 | | 2,525,000 | Subtotal | | | | | | | |
| bonus % | | 0.505.000 | Grouped | 0 | of account | | | | | | | |
| w/bonus end of 1 | 51 | 2,525,000 2,634,452 | 0 | 2,525,000 2,634,452 | incomes 0 | 164,400 | 164,400 | end of 1 | | | | |
| end of 2 | 52 | 2,034,432 | 0 | 2,034,432 | 0 | 168,120 | 168,120 | end of 2 | | | | |
| end of 3 | 53 | 2.869.268 | 0 | 2,869,268 | ő | 171,936 | 171,936 | end of 3 | | | | |
| end of 4 | 54 | 2,995,154 | 0 | 2,995,154 | ő | 175,851 | 175,851 | end of 4 | | | | |
| end of 5 | 55 | 3,127,058 | 0 | 3,127,058 | 0 | 179,868 | 179,868 | end of 5 | | | | |
| end of 6 | 56 | 3,265,277 | 0 | 3,265,277 | 0 | 183,991 | 183,991 | end of 6 | | | | |
| end of 7 | 57 | 3,410,117 | 0 | 3,410,117 | 0 | 188,222 | 188,222 | end of 7 | | | | |
| end of 8 | 58 | 3,561,902 | 0 | 3,561,902 | 0 | 192,565 | 192,565 | end of 8 | | | | |
| end of 9 | 59 | 3,720,972 | 0 | 3,720,972 | 0 | 197,024 | 197,024 | end of 9 | | | | |
| end of 10 | 60 | 3,887,682 | 0 | 3,887,682 | 0 | 201,603 | 201,603 | end of 10 | | | | |
| end of 11 | 61 | 4,062,406 | 0 | 4,062,406 | 0 | 206,305 | 206,305 | end of 11 | | | | |
| end of 12 | 62 | 4,245,538 | 0 | 4,245,538 | 0 | 211,135 | 211,135 | end of 12 | | | | |
| end of 13 | 63 | 4,437,489 | 0 | 4,437,489 | 0 | 216,097 | 216,097 | end of 13 | | | | |
| end of 14 | 64 | 4,638,692 | 0 | 4,638,692 | 0 | 221,194 | 221,194 | end of 14 | | | | |
| end of 15 | 65 | 4,849,601 | 0 | 4,849,601 | 0 | 65,845 | 65,845 | end of 15 | | | | |
| end of 16 | 66 | 5,070,692 | 0 | 5,070,692 | 0 | 68,204 | 68,204 | end of 16 | | | | |
| end of 17 | 67 | 5,302,467 | 0 | 5,302,466 | 0 | 70,657 | 70,657 | end of 17 | | | | |
| end of 18 end of 19 | 68 69 | 5,545,450 5,800,193 | 0 | 5,545,450 5,800,193 | 0 | 73,210 75,865 | 73,210 75,865 | end of 18 end of 19 | | | | |
| end of 19 end of 20 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 42,240 | 42,240 | end of 19 end of 20 | | | | |
| | 10 | 0,007,275 | 0 | 0,007,270 | 0 | 3,074,332 | 3,074,332 | enu or zu | | | | |
| | | | | | 0 | 3,074,332 | 3,074,332 | | | | | |
| Orange bac | ckgrounds in | dicate hypothe | etical returns | | | | | | | | | |

Step 13: 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 | IELP |
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| Edit Dynami | ic Mode | | | | | | | | | | |
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| Scenario Co | ndense All and | Uncondense | All Function | | | | ~ | | | | |
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| | | Acco | unts 🖉 | | | | | | | | |
| Planning | 20 years v | | 2002/01 | | 1 | | | | | | |
| Horizon | | Gro | ouped | | | Incomes [⊮] | | | | | |
| Year | 10000 | Account | Income | Accounts | Planned | Grouped | Total | Year | | | |
| net return | 50 | | Grouped | Total | Distribution | | Income | 0.000 | | | |
| initial amount | | 2,525,000 | | 2,525,000 | Subtotal | | | | | | |
| bonus % | | | Grouped | 0 | of account | | | | | | |
| w/bonus | | 2,525,000 | | 2,525,000 | incomes | | | | | | |
| end of 1 | 51 | 2,634,452 | 0 | 2,634,452 | 0 | 164,400 | 164,400 | end of 1 | | | |
| end of 2 | 52 | 2,749,123 | 0 | 2,749,123 | 0 | 168,120 | 168,120 | end of 2 | | | |
| end of 3 | 53 | 2,869,268 | 0 | 2,869,268 | 0 | 171,936 | 171,936 | end of 3 | | | |
| end of 4 | 54 | 2,995,154 | 0 | 2,995,154 | 0 | 175,851 | 175,851 | end of 4 | | | |
| end of 5 | 55 | 3,127,058 | 0 | 3,127,058 | 0 | 179,868 | 179,868 | end of 5 | | | |
| end of 6 | 56 | 3,265,277 | 0 | 3,265,277 | 0 | 183,991 | 183,991 | end of 6 | | | |
| end of 7 | 57 | 3,410,117 | 0 | 3,410,117 | 0 | 188,222 | 188,222 | end of 7 | | | |
| end of 8 | 58 | 3,561,902 | 0 | 3,561,902 | 0 | 192,565 | 192,565 | end of 8 | | | |
| end of 9 | 59 | 3,720,972 | 0 | 3,720,972 | 0 | 197,024 | 197,024 | end of 9 | | | |
| end of 10 | 60 | 3,887,682 | 0 | 3,887,682 | 0 | 201,603 | 201,603 206.305 | end of 10 | | | |
| end of 11 end of 12 | 62 | 4,062,406 4,245,538 | 0 | 4,062,406 4,245,538 | 0 | 206,305 211,135 | 206,305 | end of 11 end of 12 | | | |
| end of 12 | 63 | 4,245,538 | 0 | 4,245,558 | 0 | 216,097 | 216,097 | end of 12 end of 13 | | | |
| end of 14 | 64 | 4,437,489 | 0 | 4,437,489 | 0 | 210,097 | 210,097 | end of 13 | | | |
| end of 15 | 65 | 4,849,601 | 0 | 4,849,601 | 0 | 65,845 | 65,845 | end of 15 | | | |
| end of 16 | 66 | 5,070,692 | 0 | 5,070,692 | 0 | 68,204 | 68,204 | end of 16 | | | |
| end of 17 | 67 | 5,302,467 | 0 | 5,302,466 | 0 | 70,657 | 70,657 | end of 17 | | | |
| end of 18 | 68 | 5,545,450 | 0 | 5,545,450 | 0 | 73,210 | 73,210 | end of 18 | | | |
| end of 19 | 69 | 5,800,193 | 0 | 5,800,193 | 0 | 75,865 | 75,865 | end of 19 | | | |
| end of 20 | 70 | 6,067,275 | 0 | 6,067,276 | 0 | 42,240 | 42,240 | end of 20 | | | |
| | 10 10 | | 0 | | 0 | 3,074,332 | 3,074,332 | | | | |
| | | | | | | | | | | | |

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.