

Editing the Maximum Percentage Amounts on the Allocation Codes

12/20/2024 4:04 pm EST

Underneath the Settings subheading, you'll find the allocation codes. On the allocation codes list page, you can edit the maximum percentage amounts, which are set to 5% by default that is written in code line 10903. Once you update the maximum percentage amount, the allocation code id that you select will automatically adopt the new maximum percentage. Below are examples of updating the maximum percentages for the allocation codes.

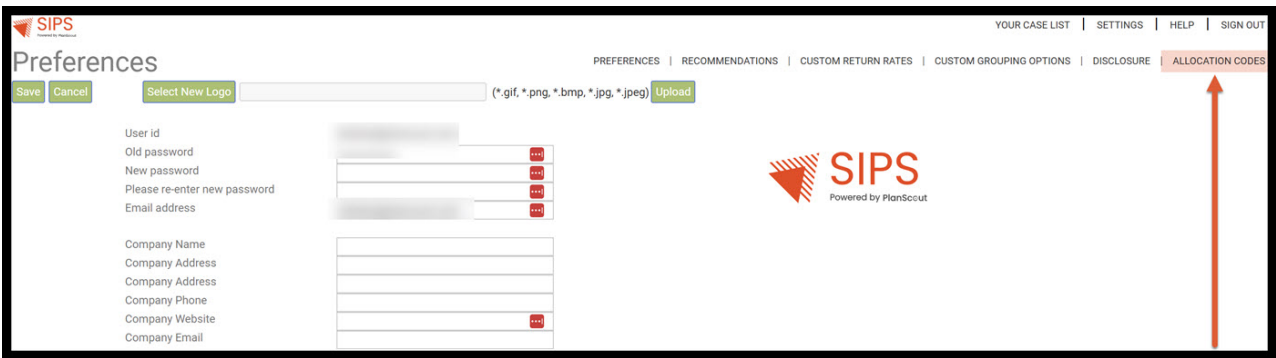
Step 1: Log In: Log in into SIPS.



Step 2: Settings: Click on the settings button located on the right-hand side of your screen.



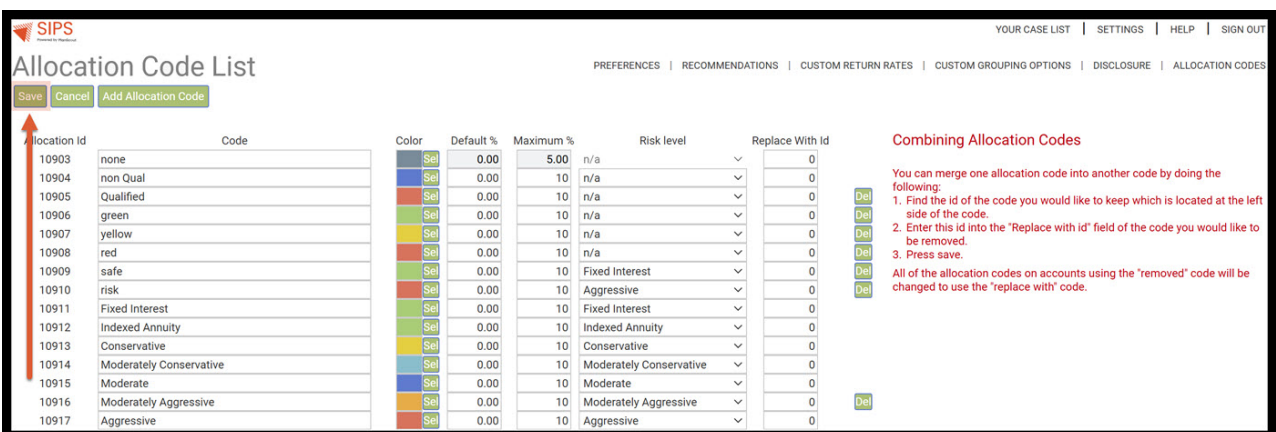
Step 3: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen.



Step 4: Maximum %: Edit the Maximum % amounts.



Step 5: Save: Click the green Save button underneath the Allocation Code List.



Step 6: Your Case List: Click on the Your Case List button located on the left-hand side of the screen.

Allocation Code List

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
10904	non Qual		0.00	10.00	n/a	0
10905	Qualified		0.00	10.00	n/a	0
10906	green		0.00	10.00	n/a	0
10907	yellow		0.00	10.00	n/a	0
10908	red		0.00	10.00	n/a	0
10909	safe		0.00	10.00	Fixed Interest	0
10910	risk		0.00	10.00	Aggressive	0
10911	Fixed Interest		0.00	10.00	Fixed Interest	0
10912	Indexed Annuity		0.00	10.00	Indexed Annuity	0
10913	Conservative		0.00	10.00	Conservative	0
10914	Moderately Conservative		0.00	10.00	Moderately Conservative	0
10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
10917	Aggressive		0.00	10.00	Aggressive	0

Combining Allocation Codes

You can merge one allocation code into another code by doing the following:

1. Find the id of the code you would like to keep which is located at the left side of the code.
2. Enter this id into the "Replace with id" field of the code you would like to be removed.
3. Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

Step 7: View All Cases: Click on the green View All Cases button underneath Your Case List heading.

Your Case List

Search for Case

Case	Initial Plan Date	Revised Date	Tag	Active
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Rows Per Page 50 << No records >>

Step 8: Case Selection: Select a case.

Your Case List

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del

Rows Per Page 15 << Page 1 of 2 >>

Step 9: Structured Income Planning: Click on the Structured Income Planning Button underneath the Client's name heading.

SIPS
 YOUR CASE LIST | SETTINGS | HELP | SIGN OUT
 PREPARED BY: DEMO ADVISOR
 INITIAL PLAN DATE: 08/14/2024
 REVISED PLAN DATE: 12/16/2024

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

Client Information

[Edit](#) [Go to Incomes >>](#)

Case Title: [Redacted] Description: [Redacted] Selection tags: [Redacted] Active

Client one: Last: [Redacted] First: [Redacted] Client two: Last: [Redacted] First: [Redacted]

Date of birth: [Redacted] Initial plan age: [Redacted] Short name: [Redacted] Date of birth: [Redacted] Initial plan age: [Redacted] Short name: Client2

Current age: [Redacted] Retirement age: [Redacted] Gender: Female Current age: [Redacted] Retirement age: [Redacted] Gender: Female

Initial plan date: [Redacted] Revision date: [Redacted] Address: [Redacted] City, State, Zip: [Redacted] Email: [Redacted] Phone: [Redacted] Cell Phone: [Redacted]

List Clients Beneficiaries (optional)

Step 10: Edit: Click on the green Edit button underneath the Structured Income Planning heading.

SIPS
 YOUR CASE LIST | SETTINGS | HELP | SIGN OUT
 PREPARED BY: DEMO ADVISOR
 INITIAL PLAN DATE: 08/14/2024
 REVISED PLAN DATE: 12/14/2024

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: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 16 years

Year	Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income						
net return	60	1.00 %	3.00 %	IRA	5.00 %	IRA	1,605,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.80 %		
Initial amount		30,000		75,000		1,500,000	0					
bonus % w/bonus		0.00 %		0.00 %		0.00 %	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	168,861	41,330	41,330	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	172,184	42,487	42,487	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	175,671	43,677	43,677	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	179,281	44,900	44,900	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	182,994	46,157	46,157	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	186,811	47,449	47,449	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	190,724	48,778	48,778	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	194,724	50,144	50,144	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	198,801	51,548	51,548	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	202,944	52,991	52,991	end of 16
			0		0			0	946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 11: Manage: Click in the green Manage button within the income column of the account.

SIPS 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: DEMO ADVISOR
INITIAL PLAN DATE: []
REVISED PLAN DATE: []

Structured Income Planning

Scenario:

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	1.00 %		3.00 %		5.00 %		1,605,000					
initial amount	30,000		75,000		1,500,000		1,605,000					
bonus %	0.00 %		0.00 %		0.00 %		0					
w/bonus	30,000	Manage	75,000	Manage	1,500,000	Manage	1,605,000	Subtotal of account incomes	Manage Infl Factor 2.00 %	Manage Infl Factor 2.80 %		
end of 1	30,300	0	77,250	0	1,575,000	0	1,682,550	0	150,000	0	150,000	end of 1
end of 2	30,603	0	79,568	0	1,653,750	0	1,763,920	0	153,000	0	153,000	end of 2
end of 3	30,909	0	81,955	0	1,736,437	0	1,849,301	0	156,060	0	156,060	end of 3
end of 4	31,218	0	84,413	0	1,823,259	0	1,938,890	0	159,181	0	159,181	end of 4
end of 5	31,530	0	86,946	0	1,914,422	0	2,032,898	0	162,365	0	162,365	end of 5
end of 6	31,846	0	89,554	0	2,010,143	0	2,131,542	0	165,612	0	165,612	end of 6
end of 7	32,164	0	92,241	0	2,110,650	0	2,235,054	0	41,330	41,330	42,487	end of 7
end of 8	32,486	0	95,008	0	2,216,182	0	2,343,676	0	42,487	42,487	43,677	end of 8
end of 9	32,811	0	97,858	0	2,326,991	0	2,457,660	0	43,677	43,677	44,900	end of 9
end of 10	33,139	0	100,794	0	2,443,341	0	2,577,273	0	44,900	44,900	46,157	end of 10
end of 11	33,470	0	103,818	0	2,565,508	0	2,702,795	0	46,157	46,157	47,449	end of 11
end of 12	33,805	0	106,932	0	2,693,783	0	2,834,520	0	47,449	47,449	48,778	end of 12
end of 13	34,143	0	110,140	0	2,828,472	0	2,972,755	0	48,778	48,778	50,144	end of 13
end of 14	34,484	0	113,444	0	2,969,896	0	3,117,824	0	50,144	50,144	51,548	end of 14
end of 15	34,829	0	116,848	0	3,118,390	0	3,270,067	0	51,548	51,548	52,991	end of 15
end of 16	35,177	0	120,353	0	3,274,310	0	3,429,840	0	52,991	52,991	1,415,679	end of 16
									946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 12: Sel: Click on the green Sel button next to the Asset Plan Allocation text box and select the asset plan Allocation.

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

Account name: Roth IRA

Initial account balance: \$75,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional
Account description: []
Optional account company: []
Other: []

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account
Years deferred: 0

Asset plan allocation: Moderate - max 10.0%

Risk level: Moderate

Account owner: []

Account type: IRA

Add an income rider
Based on: age Client2's age Joint
Select income rider: []
Number of months of payout in first year: 12.0
Enter manual payout:

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders
 Start payout from income rider

Liquidate or annuitize
 Annuitize (for years certain) 1.0 %
 Liquidate account (in so many years)

Withdrawals
 Annual fixed withdrawal []
 Annual percentage withdrawal 0.0 %
 Required minimum distribution (RMD)
 Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals
 Make-up total owners RMD from one account
 Make-up total benef RMD from one account
 Make-up income gap based on target income

Annual Savings
 Annual fixed savings []

ADD INCOME

Pick year(s)
OR
Start year for rest of plan
OR
Start year for X years []
Pick year(s) to remove
Remove year to end of plan
Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
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24		

Note that entered values WILL NOT roll down to following years when blank

Step 13: Asset Plan Allocation Code: The text box should display the allocation code and the Maximum % limit.

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values

Account name: Roth IRA

Initial account balance: \$75,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional

Account description:

Optional account company:

Other:

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account:

Years deferred: 0

Asset plan allocation: Moderate - max 10.0%

Risk level:

Account owner:

Account type:

Add an income rider

Based on: age Client2's age Joint

Select income rider:

Number of months of payout in first year:

Enter manual payout:

Structured Income Type

Income Riders

Start payout from income rider

Liquidate or annuitize

Annuitize (for years certain) 1.0 %

Liquidate account (in so many years)

Withdrawals

Annual fixed withdrawal

Annual percentage withdrawal 0.0 %

Required minimum distribution (RMD)

Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

Make-up total owners RMD from one account

Make-up total benef RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
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20		
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22		
23		
24		

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

Note that entered values WILL NOT roll down to following years when blank

Step 14: Save: Click on the green save button underneath the manage account heading.

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

Save Cancel View / Edit Income View / Edit Death Benefit View / Edit Actual Values

Account name: Roth IRA

Initial account balance: \$75,000

Hypothetical return: 3.0 %

Bonus: 0.0 %

Optional

Account description:

Optional account company:

Other:

Tax calculation option: Tax Income Distributions (Qualified)

Add money later - deferred account:

Years deferred: 0

Asset plan allocation: Moderate - max 10.0%

Risk level: Moderate

Account owner:

Account type: IRA

Add an income rider

Based on: age Client2's age Joint

Select income rider:

Number of months of payout in first year: 12.0

Enter manual payout:

Structured Income Type

Income Riders

Start payout from income rider

Liquidate or annuitize

Annuitize (for years certain) 1.0 %

Liquidate account (in so many years)

Withdrawals

Annual fixed withdrawal

Annual percentage withdrawal 0.0 %

Required minimum distribution (RMD)

Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

Make-up total owners RMD from one account

Make-up total benef RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
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10		
11		
12		
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14		
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22		
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24		

Request Additional Rider Remove Income Rider

Orange backgrounds indicate hypothetical returns

Note that entered values WILL NOT roll down to following years when blank

Step 15: 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: DEMO ADVISOR
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: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 16 years

Year	Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income						
net return	60	1.00 %	3.00 %	IRA	5.00 %	IRA	1,605,000					
initial amount		30,000		75,000		1,500,000	1,605,000	Subtotal of account incomes	Manage Infl Factor 2.00 %	Manage Infl Factor 2.80 %		
bonus % w/bonus		0.00 %		0.00 %		0.00 %	0					
		30,000	Manage	75,000	Manage	1,500,000	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	0	41,330	41,330	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	0	42,487	42,487	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	0	43,677	43,677	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	0	44,900	44,900	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	0	46,157	46,157	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	0	47,449	47,449	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	0	48,778	48,778	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	0	50,144	50,144	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	0	51,548	51,548	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	0	52,991	52,991	end of 16
									946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 16: 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: DEMO ADVISOR
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: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 16 years

Year	Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income						
net return	60	1.00 %	3.00 %	IRA	5.00 %	IRA	1,605,000					
initial amount		30,000		75,000		1,500,000	1,605,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.80 %		
bonus % w/bonus		0.00 %		0.00 %		0.00 %	0					
		30,000		75,000		1,500,000	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	0	41,330	41,330	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	0	42,487	42,487	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	0	43,677	43,677	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	0	44,900	44,900	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	0	46,157	46,157	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	0	47,449	47,449	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	0	48,778	48,778	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	0	50,144	50,144	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	0	51,548	51,548	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	0	52,991	52,991	end of 16
									946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 17: 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: DEMO ADVISOR
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: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 1 years

Year	Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income						
net return	60	1.00 %		3.00 %		5.00 %	1,605,000					
initial amount		30,000		75,000		1,500,000	1,605,000	Subtotal of account incomes	Manage Infl Factor 2.00 %	Manage Infl Factor 2.80 %		
bonus %		0.00 %		0.00 %		0.00 %	0					
w/bonus		30,000		75,000		1,500,000	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	41,330	41,330	41,330	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	42,487	42,487	42,487	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	43,677	43,677	43,677	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	44,900	44,900	44,900	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	46,157	46,157	46,157	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	47,449	47,449	47,449	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	48,778	48,778	48,778	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	50,144	50,144	50,144	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	51,548	51,548	51,548	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	52,991	52,991	52,991	end of 16
									946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 18: 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: DEMO ADVISOR
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: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 16 years

Year	Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
	Account	Income	Account	Income	Account	Income						
net return	60	1.00 %		3.00 %		5.00 %	1,605,000					
initial amount		30,000		75,000		1,500,000	1,605,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.80 %		
bonus %		0.00 %		0.00 %		0.00 %	0					
w/bonus		30,000		75,000		1,500,000	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	41,330	41,330	41,330	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	42,487	42,487	42,487	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	43,677	43,677	43,677	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	44,900	44,900	44,900	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	46,157	46,157	46,157	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	47,449	47,449	47,449	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	48,778	48,778	48,778	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	50,144	50,144	50,144	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	51,548	51,548	51,548	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	52,991	52,991	52,991	end of 16
									946,218	469,461	1,415,679	

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