

# Add Scenario Feature on the Cash Flow and Tax Advisor Page

08/07/2025 1:21 pm EDT

The Add Scenario button on the Cash Flow and Tax Advisor page is a feature that will add new scenarios to the page. Below is a step-by-step guideline on how to add a new scenario to the page.

To learn more about the Cash Flow and Tax Advisor menu see articles:

- [Condense/Uncondense Feature](#)
- [Hide/Unhide Tax Advisor](#)
- [Add Scenario Feature](#)
- [Calculating Feature](#)

To learn more about the Cash Flow and Tax Advisor individual column features see articles:

- [Hide/Unhide Feature for Individual Tax Columns](#)
- [Permanent Deletion for Individual Tax Columns](#)
- [Downloading a 1040 Sample Tax Form](#)

To learn more about forecasting effective tax rates see articles:

- [Part One: Forecasting Effective Tax Rates While the Client is working](#)
- [Part Two: Forecasting Effective Tax Rates While the Client is in retirement and before Social Security Disbursements](#)
- [Part Three: Forecasting Effective Tax Rates While the Client is in Retirement and Social Security Starts Up](#)
- [Part Four: Forecasting Effective Tax Rates in Retirement: RMDs, Social Security, and Roth Withdrawals](#)
- [Part Five: Adding Expenses into the Cash Flow and Tax Advisor Calculator](#)

Step 1: Cash Flow and Tax Advisor: Click on the Cash Flow and Tax Advisor heading underneath the Clients name heading.

Doe, Jane

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 Add Scenario Feature on the Cash Flow and Tax Advisor Page

Accounts														
Incomes														
Year	Jane	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	64	5.00 %		5.00 %	Jane inc	2,000,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.00 %	Eff Tax Rate		Infl Factor 2.00 %	from total income to target	
initial amount		750,000		1,250,000		2,000,000	0	100,000	0	(13,700)-14%	86,300	85,000	1,300	2025
bonus %		0.00 %		0.00 %		0	0	102,000	0	(13,974)-14%	88,026	86,700	1,326	2026
w/bonus		750,000		1,250,000		2,000,000	0	0	0	(529)-6%	88,434	88,434	0	2027
2025	65	787,500	0	1,312,500	0	2,100,000	0	0	0	(822)-6%	90,203	90,203	0	2028
2026	66	826,875	0	1,378,125	0	2,205,000	0	0	0	(1,115)-6%	92,007	92,007	0	2029
2027	67	779,255	88,963	1,447,031	0	2,226,286	88,963	0	0				0	2030
2028	68	727,193	91,025	1,519,382	0	2,246,576	91,025	0	0				0	2031
2029	69	670,431	93,122	1,595,352	0	2,265,782	93,122	0	0				0	2032
2030	70	642,412	61,540	1,675,119	0	2,317,532	61,540	0	34,911	(2,604)-5%	93,847	93,847	0	2033
2031	71	611,626	62,906	1,758,875	0	2,370,502	62,906	0	35,609	(2,792)-5%	95,724	95,724	0	2034
2032	72	577,911	64,297	1,846,818	0	2,424,730	64,297	0	36,321	(2,980)-5%	97,638	97,638	0	2035
2033	73	541,094	65,712	1,939,159	0	2,480,254	65,712	0	37,048	(3,169)-5%	99,591	99,591	0	2036
2034	74	500,996	67,153	2,036,117	0	2,537,113	67,153	0	37,789	(3,359)-5%	101,583	101,583	0	2037
2035	75	526,046	0	2,055,154	82,769	2,581,200	82,769	0	38,545	(4,702)-12%	116,611	103,615	12,997	2038
2036	76	552,348	0	2,071,196	86,715	2,623,544	86,715	0	39,315	(4,796)-12%	121,234	105,687	15,548	2039
2037	77	579,965	0	2,084,310	90,445	2,664,276	90,445	0	40,102	(4,892)-12%	125,655	107,801	17,854	2040
2038	78	608,964	0	2,093,785	94,741	2,702,748	94,741	0	40,904	(4,990)-12%	130,655	109,957	20,698	2041
2039	79	639,412	0	2,099,242	99,232	2,738,654	99,232	0	41,722	(5,090)-12%	135,863	112,156	23,708	2042
2040	80	671,382	0	2,100,281	103,923	2,771,664	103,923	0	42,556	(5,192)-12%	141,287	114,399	26,889	2043
2041	81	704,951	0	2,097,033	108,262	2,801,985	108,262	0	43,407	(5,296)-12%	146,374	116,687	29,687	2044
2042	82	740,199	0	2,088,532	113,353	2,828,731	113,353	0	44,276	(5,402)-12%	152,227	119,021	33,207	
2043	83	777,209	0	2,074,962	117,996	2,852,171	117,996	0	45,161	(5,510)-12%	157,648	121,401	36,247	
2044	84	816,069	0	2,055,201	123,510	2,871,270	123,510	0	46,064	(5,620)-12%	163,954	123,829	40,125	
		594,719		1,020,946		1,615,665		202,000	603,730	(96,535)	2,324,860	2,065,276	259,584	

Step 2: Edit: Click on the green edit button underneath the Cash Flow and Tax Advisor heading.



**Cashflow and Tax Advisor**

File Save Cancel Condense Hide Tax Advisor **Add Scenario** Calculate

Tax Filing	2025 (PROV)	2027 (PROV)	2030 (PROV)	2035 (PROV)
	Cash Flow	Tax Return	Cash Flow	Tax Return
Income				
1 Wages	100,000	100,000		
2a Tax Exempt Int				
2b Taxable Interest				
3a Qualified Dividends				
3b All Dividends				
4 Client 1 Distributions				82,769
4 Client 2 Distributions				
4 Other				
4 Client1 Pension				
4 Client2 Pension				
4 Other				
4a Roth Conversion				
4a Client1 Social Security			34,911	38,545
4a Client2 Social Security				
4a Total Social Security			34,911	38,545
7 Short Term Cap Gains		39,575	39,575	
7 Long Term Cap Gains		50,000	50,000	
81 Self Employ Biz - QBI				
81 Self Employ Biz - not QBI				
81 Sch E (no SE Tax) - QBI				
81 Sch E (no SE Tax) - not QBI				
81 All Other Schedule 1 Income				
81 SE Tax Deduction				
81 All Other Adj't to Income				
Income Total \$	100,000	100,000	89,575	89,575
Expenditures				
Medical Expenses (7.5%)				
Property & State Taxes				
Mortgage Interest				
Charities				
All other Schedule A				
Mortgage - Rent				
Home Insurance				
Utilities				
Phone - Cable				
Maint - Landscaping				
Cars				
Car Insurance				
Car gas and maintenance				
Boat - RV				
Life Insurance				
Food and Grocery				
Clothes - Home goods				
Entertainment - Meals				
Travel - Hobbies				
Credit Cards				
Savings				
Other Expenses				
Income Taxes				
Expenditures Total \$				
Income Taxes				
Standard Deduction	overrides	14,881	17,501	18,506
12 Largest Ded - Sched A or Std	overrides	14,881	17,501	18,506
13 Qual Biz Income Deduction				
Cap Gains and Qual Dividnds			50,000	60,000
15 TAXABLE INCOME		85,119	72,074	76,972
19 Enter Tax Credits				
23 Self Employment Taxes				
24 Approximate Tax Calc	22 % Tax Bracket 13.7 % EIT Tax Rate	13,683	12 % Tax Bracket 8.4 % EIT Tax Rate	5,388
Approximate State Tax Calc	%	5,723	%	5,388
Discretionary Income \$	86,317	83,852	95,327	106,474
Used on "Print 1040" Form Only				
25d Tax Payments Withheld				
32 All other tax credits				
32 Estimated Tax Payments				
33 Total Payments				
34 Refund				
37 Amount you owe	13,683	5,723	5,388	14,840

Step 4: Cashflow and Tax Advisor View: A new column of the Tax Filings should automatically appear on right hand side of the screen.

**Cashflow and Tax Advisor**

File Save Cancel Condense Hide Tax Advisor Add Scenario Calculate

Tax Filing: 2025 (PROV) 2027 (PROV) 2030 (PROV) 2035 (PROV) 2035 (PROV) Scenario 5

	Working	Early Retirement	Social Security	SS & Roth Withdraws	Scenario 5
	Cash Flow Tax Return	Cash Flow Tax Return	Cash Flow Tax Return	Cash Flow Tax Return	Cash Flow Tax Return
Income					
1 Wages	100,000 100,000				
2a Tax Exempt Int					
2b Taxable Interest					
3a Qualified Dividends					
3b All Dividends					
4 Client 1 Distributions				82,769 82,769	82,769 82,769
4 Client 2 Distributions					
4 Other					
4 Client1 Pension					
4 Client2 Pension					
4 Other					
4a Roth Conversion					
4a Client1 Social Security			34,911 38,545	38,545 38,545	38,545 38,545
4a Client2 Social Security			34,911 29,674	38,545 32,763	38,545 32,763
4b Total Social Security			34,911 29,674	38,545 32,763	38,545 32,763
7 Short Term Cap Gains		39,575 39,575	5,804 5,804		
7 Long Term Cap Gains		50,000 50,000	60,000 60,000		
51 Self Employ Biz - QBI					
51 Self Employ Biz - not QBI					
51 Sch E (no SE Tax) - QBI					
51 Sch E (no SE Tax) - not QBI					
51 All Other Schedule 1 Income					
51 SE Tax Deduction					
51 All Other Adj to Income					
11 Income Total \$	100,000 100,000	89,575 89,575	100,715 95,478	121,314 115,532	121,314 115,532
Expenses					
Medical Expenses (7.5%)					
Property & State Taxes					
Mortgage Interest					
Charities					
All other Schedule A					
Mortgage - Rent					
Home Insurance					
Utilities					
Phone - Cable					
Maint - Landscaping					
Cars					
Car Insurance					
Car gas and maintenance					
Boat - RV					
Life Insurance					
Food and Grocery					
Clothes - Home goods					
Entertainment - Meals					
Travel - Hobbies					
Credit Cards					
Savings					
Other Expenses					
Income Taxes					
Expenses Total \$					
Income Taxes					
Standard Deduction	14,881	17,501	18,506	20,311	20,311
12 Largest Ded - Schd A or Std	14,881	17,501	18,506	20,311	20,311
13 Qual Biz Income Deduction					
Cap Gains and Qual Dividnds		50,000	60,000		
15 TAXABLE INCOME	85,119	72,074	76,972	95,221	95,221
19 Enter Tax Credits					
23 Self Employment Taxes					
24 Approximate Tax Calc	13,683	5,723	5,388	14,840	14,840
Approximate State Tax Calc					
Discretionary Income \$	86,317	83,852	95,327	106,474	106,474
Used on "Print 1040" Form Only					
254 Tax Payments Withheld					
32 All other tax credits					
32 Estimated Tax Payments					
33 Total Payments					
34 Refund					
37 Amount you owe	13,683	5,723	5,388	14,840	14,840

Step 5: Save: Click on the green save button underneath the Cash Flow and Tax Advisor heading.

Cashflow and Tax Advisor

EditSaveCancelCondenseHide Tax AdvisorAdd ScenarioCalculate

Tax Filing

Jane2025 (PROV)Working

Jane2027 (PROV)Early Retirement

Jane2030 (PROV)Social Security

Jane2035 (PROV)SS & Roth Withdraws

Jane2035 (PROV)Scenario 5

Income

Cash FlowTax ReturnCash FlowTax ReturnCash FlowTax ReturnCash FlowTax ReturnCash FlowTax Return

1Wages100,000100,000

2aTax Exempt Int

2bTaxable Interest

3aQualified Dividends

3bAll Dividends

4Client 1 Distributions

4Client 2 Distributions

4Other

4Client 1 Pension

4Client 2 Pension

4Other

4Roth Conversion

6aClient 1 Social Security

6aClient 2 Social Security

6bTotal Social Security

7Short Term Cap Gains

7Long Term Cap Gains

S1Self Employ Biz - QBI

S1Self Employ Biz - not QBI

S1Sch E (no SE Tax) - QBI

S1Sch E (no SE Tax) - not QBI

S1All Other Schedule 1 Income

S1SE Tax Deduction

S1All Other Adj to Income

11Income Total \$100,000100,00089,57589,575100,71595,478121,314115,532121,314115,532

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](mailto:support@planscout.com).