Downloading a 1040 Sample Tax Form

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A valuable feature of SIPS is the ability to download a sample 1040 form directly from the Cash Flow and Tax Advisor landing page. Below are the step-by-step instructions for downloading a sample 1040 sample form.

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

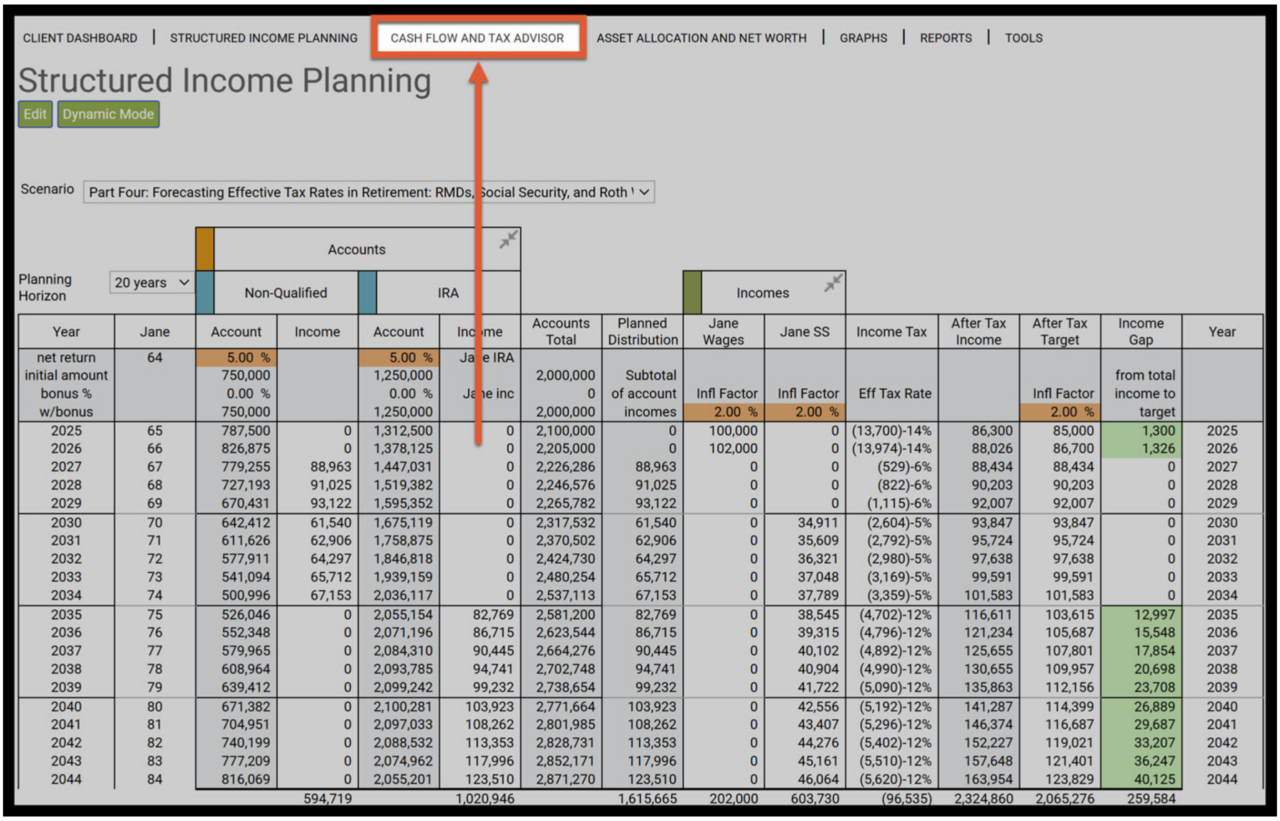
To learn more about the Cash Flow and Tax Advisor individual column features see articles:

- 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 button underneath the Client's name heading.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Structured Income Planning

Edit Dynamic Mode

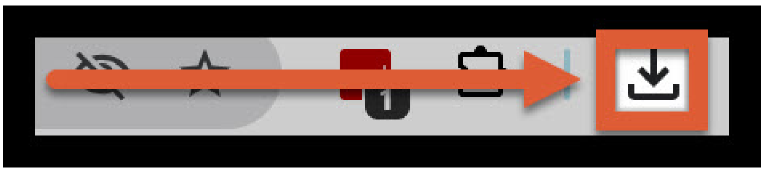
Scenario: Part Four: Forecasting Effective Tax Rates in Retirement: RMDs, Social Security, and Roth

Planning Horizon: 20 years

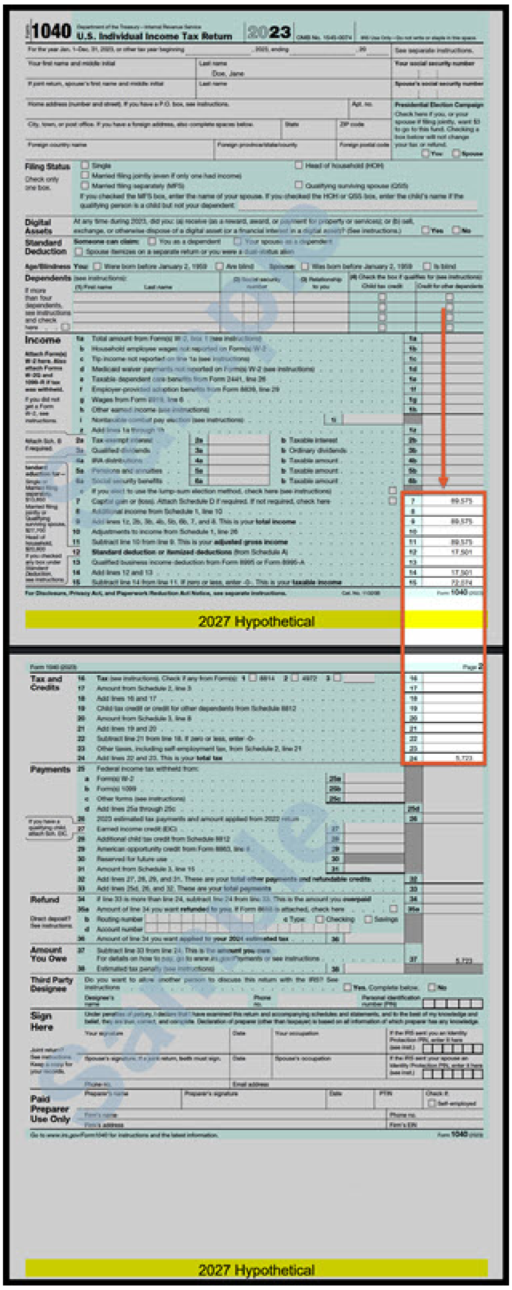
		Accounts						Incomes						
		Non-Qualified		IRA										
Year	Jane	Account	Income	Account	Income	Accounts Total	Planned Distribution	Jane Wages	Jane SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year
net return	64	5.00 %		5.00 %	Jane IRA									
initial amount		750,000		1,250,000		2,000,000	Subtotal						from total	
bonus %		0.00 %		0.00 %	Jane inc	0	of account	Infl Factor	Infl Factor	Eff Tax Rate		Infl Factor	income to	
w/bonus		750,000		1,250,000		2,000,000	incomes	2.00 %	2.00 %			2.00 %	target	
2025	65	787,500	0	1,312,500	0	2,100,000	0	100,000	0	(13,700)-14%	86,300	85,000	1,300	2025
2026	66	826,875	0	1,378,125	0	2,205,000	0	102,000	0	(13,974)-14%	88,026	86,700	1,326	2026
2027	67	779,255	88,963	1,447,031	0	2,226,286	88,963	0	0	(529)-6%	88,434	88,434	0	2027
2028	68	727,193	91,025	1,519,382	0	2,246,576	91,025	0	0	(822)-6%	90,203	90,203	0	2028
2029	69	670,431	93,122	1,595,352	0	2,265,782	93,122	0	0	(1,115)-6%	92,007	92,007	0	2029
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	2030
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	2031
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	2032
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	2033
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	2034
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	2035
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	2036
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	2037
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	2038
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	2039
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	2040
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	2041
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	2042
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	2043
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	2044
			594,719		1,020,946		1,615,665	202,000	603,730	(96,535)	2,324,860	2,065,276	259,584	

Step 2: Print 1040: Scroll drown and click on the green Print 1040 button for the particular tax year you would like to use.

Step 3: Download: Download the pdf.



Step 4: Open the PDF: Double click and open the PDF. The numbers put into the cash flow and tax advisor should correlate on the Sample 1040 Tax Form.



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.