Editing the Initial Plan Date in a SIPS Plan

02/13/2025 3:06 pm EST

Within your SIPS plan, you can edit your initial plan date. If you change your initial plan date to be more than one year old than the revision date, the older years will be grayed out in your SIPS plan. The grayed-out years are stating that those years are over and the plan is moving to the next current year. The numbers that are in the columns on the Structured Income Planning Page represent the values at the end of each respective year. In the display options if you switch the view to plans years instead of calendar years the years that are in the past will stay grayed out since they are no longer current. Below are the step by step instructions for editing your initial plan date.

For more getting started articles about the Structured Income plan, please see:

- Understanding a Basic Structured Income Plan
- Understanding a Structured Income Plan that has a Target Income and an After-Tax Target Columns
- Planning Horizon Timeline
- Editing the Social Security Age

Step 1: Case Selection: Double click on the case you would like to open up.

			YOUR CASE LIST	SETTINGS HELP SIGN OUT
Your Case List				
Add Case View All Cases Search Using Selection				
Search for Case				
Case	Initial Plan D ite	Revised Date	Tags	Active
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Doe, Jane	01/01/2025	02/12/2025	Demo Advisor	
Doe, John	01/01/2025	02/13/2025		De De
Doe, John & Doe, Jane	01/01/2025	12/30/2024		🖌 Del
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Annual				
			Rows Per	Page 15 《 < Page 1 of 2 > >>

Step 2: Edit: Click on the green edit button underneath the Client Information heading.

Do	e, Jo	ohn									PREPARED BY	DEMO ADVISOR 01/01/2025
CLIEN	IT DASHBOA	ARD STRUCTURED	INCOME PLANNING	CASH FLOW AND TA	X ADVISOR AS	SET ALLOCATION AND	NET WORTH GRAPHS	REPORTS TO	OLS		REVISED PLAN DATE	02/13/2025
	Goto Inco	Information on the second s	ion			CL	IENT INFORMATION INC	OMES ASSETS	GOALS AND OBJEC	TIVES	RECOMMENDATIONS ADVISOR NOTE:	S DISCLOSURE
Case Descr	Title iption	Doe, John		••]					Selection tags			Active 🖉
Client	one	Last		First	Client two	Last		First	Initial plan date Revision date	01/01/2025		
		Date of birth 01/01/1965 Current age 60	Initial plan age 60 Retirement age 65	Short name John Gender Male V		Date of birth Current age 0	Initial plan age 0 Retirement age 0	Short name Client2 Gender Female V	Address City, State, Zip Email Phone Cell Phone Cell Phone			

Step 3: Initial Plan Date: Delete the date that is entered and enter in a new initial plan date.

•											
Doe J	ohn									PREPARED BY:	DEMO ADVISOR
200,0	Ullill .									INITIAL PLAN DATE:	01/01/2025
CLIENT DASHBO	ARD STRUCTURED IN	ICOME PLANNING	CASH FLOW AND TAX	ADVISOR AS	SET ALLOCATION AND NET	WORTH GRAPHS	REPORTS TOO	DLS		REVISED PLAN DATE:	02/13/2025
Client Edit Save C	Informatic	on			CLIEN	TINFORMATION INCO	MES ASSETS	GOALS AND OBJEC	TIVES RECOMMENDATION	S ADVISOR NOTES	DISCLOSURE
Case Title Description	Doe, John							Selection tags	Demo Advisor		Active 🖌
Client one	Last Doe		First John	Client two	Last		First	Initial plan date Revision date	01/01/2025		
	Date of birth 01/01/1965	Initial plan age	Short name John		Date of birth	Initial plan age	Short name Client2	Address City, State, Zip			
	Current age	Retirement age	Gender		Current age	Retirement age	Gender	Phone			
	00	05	iviale 🗸		U	0	Permale V	Cell Phone			
								Cell Phone			

Step 4: Save: Click on the green save button underneath the Client Information heading.

Doe, J	ohn								PREPARED	BY: DEMO ADVISOR
									INITIAL PLAN DA	TE: 01/01/2025
CLIENT DASHBO	OARD STRUCTURED INC	COME PLANNING	ASH FLOW AND TAX	ADVISOR AS	SET ALLOCATION AND NET	WORTH GRAPHS	REPORTS TO	DLS	REVISED PLAN D	TE: 02/13/2025
Client Edit Save C	Informatio	on I			CLIEN	TINFORMATION INCO	MES ASSETS	GOALS AND OBJEC	TIVES RECOMMENDATIONS ADVISOR NO	tes disclosure
Case Titl Description	Doe, John							Selection tags	Demo Advisor	Active 🖌
Client on	Last		First John	Client two	Last		First	Initial plan date Revision date	01/01/2023	
	Date of birth 01/01/1965	Initial plan age	Short name John		Date of birth	Initial plan age	Short name Client2	Address City, State, Zip Email		
	Current age 60	Retirement age 65	Gender Male ~		Current age 0	Retirement age 0	Gender Female ✓	Phone Cell Phone Cell Phone		

Step 5: Structured Income Planning: Click on the Structured Income Planning subheading button.

DOE, C	IOHN NOARD STRUCTURED	INCOME PLANNING	4			RTH GRAPHS	REPORTS TOO	DLS	PREPARE INITIAL PLAN REVISED PLAN	D BY: DEMO ADVISOR ATE: 01/01/2023 ATE: 02/13/2025
Client Edit Goto Ir	Informati	ion			c	CLIENT INFORMATION INCOM	MES ASSETS	GOALS AND OBJEC	CTIVES RECOMMENDATIONS ADVISOR 1	otes disclosure
Case Title Description	Doe, John		••]					Selection tags	Demo Advisor	Active 🖉
Client one	Last Doe Date of birth 01/01/1965 Current age 60	Initial plan age 58 Retirement age 65	First John Short name John Gender Male V	Client two	Last	Initial plan age 0 Retirement age 0	First Short name Client2 Gender Female V	Initial plan date Revision date Address City, State, Zip Email Phone Cell Phone Cell Phone	01/01/2023 02/13/2025	

Step 6: Scenario: Select a scenario you would like to be looking at.

Doe, Jo	Ohn Ard stru	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	dvisor 4	ASSET ALLOC	ATION AND NET	WORTH C	RAPHS F	EPORTS	TOOLS			PREPARED BY INITIAL PLAN DATE REVISED PLAN DATE	DEMO ADVISOR 01/01/2023 02/13/2025
Structu	ured li	ncom	e Plar	nning												
Edit Dynamic	Mode															
Scenario Editi	ing the Initial I	Plan Date in a	SIPS Plan				×									
			Acco	unts	×		-Т									
Planning	20 years 🗸	Nez Oveli	God Associat					la la constante de								
Horizon		Non-Quai	ned Account		IKA			inco	I	Anney					1	
Year	John	Account	Income	Account	Income	Accounts Total	Planed Distriutio	John Wages	John SS	Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return initial amount	58	6.00 % 675.000		5.00 %	John IRA	1.675.000	Sultota						from total			
bonus %		0.00 %		0.00 %	John inc	0	of ac oun	Infl Factor	Infl Factor			Infl Factor	income to			
w/bonus		675,000		1,000,000		1,675,000	income	2.00 %	2.50 %			2.00 %	target			
2023	59	715,500	0	1,050,000	0	1,765,500		125,000	0	(20,076)	104,924	75,000	29,924	2023		
2024	60	758,430	0	1,102,500	0	1,860,930		127,500	0	(20,138)	107,362	76,500	30,862	2024		
2025	62	803,930	0	1,157,625	0	1,901,001		130,050	0	(20,548)	111 695	78,030	31,472	2025		
2020	63	822 120	81 182	1,215,500	0	2,007,078	8 18	132,031	0	(20,900)	81 182	81 182	32,094	2020		
2028	64	788,640	82.806	1,340.096	0	2.128.736	82.80	0	0	0	82,806	82.806	0	2028		
2029	65	751,497	84,462	1,407,100	0	2,158,597	84,462	0	0	0	84,462	84,462	0	2029		
2030	66	710,435	86,151	1,477,455	0	2,187,890	86,15	0	0	0	86,151	86,151	0	2030		
2031	67	665,187	87,874	1,551,328	0	2,216,514	87,874	0	0	0	87,874	87,874	0	2031		
2032	68	615,466	89,632	1,628,894	0	2,244,360	89,632	0	0	0	89,632	89,632	0	2032		
2033	69 70	560,969	91,425	1,710,339	0	2,2/1,308	91,42	0	42.962	(020)	91,425	91,425	0	2033		
2034	70	525 958	51 114	1,885,649	0	2,340,203	51 114		44,960	(955)	95,200	95,233	ő	2034		
2036	72	505,499	52.016	1,979,931	0	2,485,430	52.016	0	46.084	(1.079)	97.020	97.020	ő	2036		
2037	73	535,829	0	2,078,928	0	2,614,757	(0	47,236	0	47,236	98,961	(51,725)	2037		
2038	74	567,979	0	2,182,874	0	2,750,853	(0	48,417	0	48,416	100,940	(52,524)	2038		
2039	75	602,058	0	2,203,282	88,735	2,805,340	88,73	0	49,627	0	138,362	102,959	35,403	2039		
2040	76	638,181	0	2,220,481	92,966	2,858,662	92,966	0	50,868	0	143,833	105,018	38,815	2040		
2041	77	676,472	0	2,234,541	96,964	2,911,013	96,964	0	52,139	0	149,104	107,118	41,985	2041		
2042	/8	/17,060	756 999	2,244,698	101,570	2,961,758	1 1 27 11	0 515 001	53,443	(94 500)	155,013	1 922 202	45,752	2042		
			/00,083		380,234		1,137,11	515,201	430,035	(84,593)	2,004,361	1,822,302	182,058			

Step 7: Initial Plan Date: The initial plan date should automatically reflect the back date you have entered.

Doe, Jo	ohn										_					PREPARED B	C DEMO ADVISOR
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A		SSET ALLOCA	TION AND NET	WORTH C	BRAPHS F		TOOLS				REVISED PLAN DATE	E: 01/01/2023
Structu	ired li	ncom	e Plar	nina													
Edit Dynamic	Mode	100111	e i lai	ining													
Scenario Editi	ng the Initial I	Plan Date in a	SIPS Plan				~										
			Acco	unts	×												
Planning Horizon	20 years 🗸	Non-Quali	fied Account	1	IRA			Inco	mes > ^K								
Year	John	Account	Income	Account	Income	Accounts Total	Planned Distribution	John Wages	John SS	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year			
net return	58	6.00 %		5.00 %	John IRA	1 675 000	Subtotal						from total		1		
bonus %		0.00 %		0.00 %	John inc	1,073,000	of account	Infl Factor	Infl Factor			Infl Factor	income to				
w/bonus		675,000		1,000,000		1,675,000	incomes	2.00 %	2.50 %			2.00 %	target				
2023	59	715,500	0	1,050,000	0	1,765,500	0	125,000	0	(20,076)	104,924	75,000	29,924	2023	1		
2024	60	758,430	0	1,102,500	0	1,860,930	0	127,500	0	(20,138)	107,362	76,500	30,862	2024			
2025	61	803,936	0	1,157,625	0	1,961,561	0	130,050	0	(20,548)	109,502	78,030	31,4/2	2025			
2020	63	822 120	81 182	1,215,500	0	2,007,078	81 182	132,051	0	(20,900)	81 182	81 182	32,094	2020			
2028	64	788,640	82,806	1,340,096	0	2,000,401	82,806	0	0	0	82,806	82,806	0	2028			
2029	65	751,497	84,462	1,407,100	0	2,158,597	84,462	0	0	0	84,462	84,462	0	2029			
2030	66	710,435	86,151	1,477,455	0	2,187,890	86,151	0	0	0	86,151	86,151	0	2030			
2031	67	665,187	87,874	1,551,328	0	2,216,514	87,874	0	0	0	87,874	87,874	0	2031			
2032	68	615,466	89,632	1,628,894	0	2,244,360	89,632	0	0	0	89,632	89,632	0	2032			
2033	69	560,969	91,425	1,710,339	0	2,271,308	91,425	0	0	0	91,425	91,425	0	2033			
2034	70	544,407	50,220	1,795,856	0	2,340,263	50,220	0	43,863	(830)	93,253	93,253	0	2034			
2035	/1	525,958	51,114	1,885,649	0	2,411,606	51,114	0	44,960	(955)	95,118	95,118	0	2035			
2030	72	535,829	52,016	2 078 028	0	2,400,430	52,016	0	40,084	(1,0/9)	47 236	97,020	(51 725)	2030			
2038	74	567 979	0	2 182 874	0	2 750 853	0	0	48.417	0	48,416	100,940	(52 524)	2038			
2039	75	602,058	0	2,203,282	88,735	2,805,340	88,735	0	49,627	0	138,362	102,959	35,403	2039			
2040	76	638,181	0	2,220,481	92,966	2,858,662	92,966	0	50,868	0	143,833	105,018	38,815	2040			
2041	77	676,472	0	2,234,541	96,964	2,911,013	96,964	0	52,139	0	149,104	107,118	41,985	2041			
2042	78	717,060	0	2,244,698	101,570	2,961,758	101,570	0	53,443	0	155,013	109,261	45,752	2042			
			756,883		380,234		1,137,117	515,201	436,635	(84,593)	2,004,361	1,822,302	182,058				

Step 8: Grayed Out Years: The year that are grayed out in the SIPS plan are the years that have already passed.

Doe, Jo	ohn															PREPARED BY: INITIAL PLAN DATE:	DEMO ADVISOR 01/01/2023
CLIENT DASHBO	ARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR	ASSET ALLOCA	TION AND NET	WORTH G	RAPHS R	EPORTS	TOOLS			F	REVISED PLAN DATE:	02/13/2025
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Editi	ng the Initial I	Plan Date in a	SIPS Plan				~										
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Planning 20 years V Noo Qualified Account IIDA																	
Planning 20 years V Non-Qualified Account IRA Incomes																	
100-0	Horizon Non-Qualified Account IRA Incomes Veran John Account Income Account Planned John John SS Income After Tax After Tax Income Year													1			
Year John Account Income Account Income Planned Total Dohn SU John SU After Tax Income After Tax Taget Income Year																	
net return	58	6.00 %		5.00 %	John IRA												
initial amount		675,000		1,000,000	John inc	1,675,000	Subtotal	Infl Eactor	Infl Eactor			Infl Eastor	from total				
w/bonus		675,000		1 000 000	John nic	1675.000	incomes	2 00 %	2 50 %			2 00 %	tarnet				
2023	59	715,500	0	1,050,000	0	1,765,500	0	125,000	0	(20,076)	104,924	75,000	29,924	2023			
2024	60	758,430	0	1,102,500	0	1,860,930	0	127,500	0	(20,138)	107,362	76,500	30,862	2024			
2025	01	803,930	0	1,157,025	0	1,901,001	0	130,050	0	(20,548)	109,502	78,030	31,4/2	2025	r		
2026	62	852,172	01 102	1,215,506	0	2,067,678	01 102	132,651	0	(20,966)	01 102	/9,591	32,094	2026			
2027	64	788 640	82,806	1,270,202	0	2,098,401	82,806	0	0	0	82,806	82,806	0	2027			
2029	65	751,497	84,462	1,407,100	0	2,158,597	84,462	0	0	0	84,462	84,462	Ő	2029			
2030	66	710,435	86,151	1,477,455	0	2,187,890	86,151	0	0	0	86,151	86,151	0	2030			
2031	67	665,187	87,874	1,551,328	0	2,216,514	87,874	0	0	0	87,874	87,874	0	2031			
2032	68	615,466	89,632	1,628,894	0	2,244,360	89,632	0	0	0	89,632	89,632	0	2032			
2033	69	560,969	91,425	1,710,339	0	2,271,308	91,425	0	0	0	91,425	91,425	0	2033			
2034	70	544,407	50,220	1,795,856	0	2,340,263	50,220	0	43,863	(830)	93,253	93,253	0	2034			
2035	71	525,958	52,016	1,885,049	0	2,411,000	52,016	0	44,960	(1070)	95,118	95,118	0	2035			
2030	73	535 829	02,010	2 078 928	0	2614757	02,010	0	47,236	(1,073)	47 236	98 961	(51 725)	2037			
2038	74	567,979	0	2.182.874	0	2.750.853	0	0	48,417	0	48,416	100,940	(52,524)	2038			
2039	75	602,058	0	2,203,282	88,735	2,805,340	88,735	0	49,627	0	138,362	102,959	35,403	2039			
2040	76	638,181	0	2,220,481	92,966	2,858,662	92,966	0	50,868	0	143,833	105,018	38,815	2040			
2041	77	676,472	0	2,234,541	96,964	2,911,013	96,964	0	52,139	0	149,104	107,118	41,985	2041			
2042	78	717,060	0	2,244,698	101,570	2,961,758	101,570	0	53,443	0	155,013	109,261	45,752	2042			
			756,883		380,234		1,137,117	515,201	436,635	(84,593)	2,004,361	1,822,302	182,058				

Step 9: Values at the End of the Year: The numbers reflected in the columns are the values at the end of the year.

Doe, Jo	ohn					20			1.00	40	22				PREPARED BY: INITIAL PLAN DATE:	DEMO ADVISOR 01/01/2023
CLIENT DASHBO	ARD STRU	JCTURED INCOM	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSET ALLOCAT	TION AND NET	WORTH G	RAPHS R	EPORTS	TOOLS			REVISED PLAN DATE:	02/13/2025
Structu	ured li	ncom	e Plar	nning												
Edit Dynamic	Mode															
Scenario Editi	ng the Initial I	Plan Date in a	SIPS Plan				~									
		_			~											
			Acco	unts	7											
Planning Horizon	20 years ∽	Non-Qualit	fied Account		IRA			Inco	mes 📈							
Year	John	Account	Income	Account	Income	Accounts Total	Planned Distribution	John Wages	John SS	Approx Income Tax	After Tax Income	After Tax Target	Income Gap	Year		
net return	58	6.00 %		5.00 %	John IRA	1 675 000	Cubtotal						from total			
honus %		0.00 %		0.00 %	John inc	1,675,000	of account	Infl Factor	Infl Factor			Infl Factor	income to			
w/bonus		675.000		1.000.000		1.675.000	incomes	2 00 %	2 50 %			2.00 %	target			
2023	59	715,500	0	1,050,000	0	1,765,500	0	125,000	0	(20,076)	104,924	75,000	29,924	2023		
2024	60	758.430	0	1.102.500	0	1.860.930	0	127.500	0	(20.138)	107.362	76.500	30.862	2024		
2025	61	803,936	0	1,157,625	0	1,961,561	0	130,050	0	(20,548)	109,502	78,030	31,472	2025		
2026	62	852,172	01 100	1,215,506	0	2,067,678	01 100	132,651	0	(20,966)	111,685	79,591	32,094	2026		
2027	03	822,120	81,182	1,276,282	0	2,098,401	81,182	0	0	0	81,182	81,182	0	2027		
2028	65	751 497	84 462	1,040,090	0	2,120,/30	84.462	0	0	0	84 462	84.462	0	2020		
2030	66	710,435	86,151	1.477.455	0	2,187,890	86,151	0	0	0	86,151	86,151	0	2030		
2031	67	665,187	87,874	1,551,328	0	2,216,514	87,874	0	0	0	87,874	87,874	0	2031		
2032	68	615,466	89,632	1,628,894	0	2,244,360	89,632	0	0	0	89,632	89,632	0	2032		
2033	69	560,969	91,425	1,710,339	0	2,271,308	91,425	0	0	0	91,425	91,425	0	2033		
2034	70	544,407	50,220	1,795,856	0	2,340,263	50,220	0	43,863	(830)	93,253	93,253	0	2034		
2035	71	525,958	51,114	1,885,649	0	2,411,606	51,114	0	44,960	(955)	95,118	95,118	0	2035		
2036	72	505,499	52,016	1,979,931	0	2,485,430	52,016	0	46,084	(1,079)	97,020	97,020	0	2036		
2037	73	535,829	0	2,078,928	0	2,614,757	0	0	47,236	0	47,236	98,961	(51,725)	2037		
2038	74	567,979	0	2,182,874	00.705	2,750,853	00.705	0	48,417	0	48,416	100,940	(52,524)	2038		
2039	75	629 191	0	2,203,282	08,/35	2,005,340	08,/35	0	49,627	0	142 922	102,959	35,403	2039		
2040	70	676 472	0	2,220,401	92,900	2,008,002	92,900	0	52 139	0	149,000	105,018	41 985	2040		
2042	78	717.060	0	2,244,698	101.570	2,961,758	101.570	0	53,443	0	155.013	109,261	45,752	2041		
			756,883		380,234		1,137,117	515.201	436,635	(84,593)	2.004.361	1.822.302	182.058			

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

Doe, J	ohn										14				PREPARED BY	DEMO ADVISOR 01/01/2023
CLIENT DASHBO	DARD STRU	JCTURED INCO	ME PLANNING	CASH FL	OW AND TAX A	DVISOR A	ASSET ALLOCA	TION AND NET	WORTH 0	RAPHS R	EPORTS	TOOLS			REVISED PLAN DATE	02/13/2025
Struct	ured li	ncom	e Plar	nina												
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Accounts																
Pl nning 20 years V Non-Qualified Account IRA Incomes																
H tron Non-Qualified Account IRA Incomes																
Year	Year John Account Income Account Income Account Income Trate Distribution Wears John SS Approx After Tax After Tax Income Year															
	Year John Account Income Account Income Account Income Account Total Distribution Wages John SS Approx After Tax Income T															
net return	58	6.00 %		5.00 %	John IRA	1675.000	Subtotal						from total			
bonus %		0.00 %		0.00 %	John inc	1,073,000	of account	Infl Factor	Infl Factor			Infl Factor	income to			
w/bonus		675,000		1,000,000		1,675,000	incomes	2.00 %	2.50 %			2.00 %	target			
2023	59	715,500	0	1,050,000	0	1,765,500	0	125,000	0	(20,076)	104,924	75,000	29,924	2023	1	
2024	60	758,430	0	1,102,500	0	1,860,930	0	127,500	0	(20,138)	107,362	76,500	30,862	2024		
2025	61	803,936	0	1,157,625	0	1,961,561	0	130,050	0	(20,548)	109,502	78,030	31,472	2025		
2026	62	852,172	0	1,215,506	0	2,067,678	0	132,651	0	(20,966)	111,685	79,591	32,094	2026		
2027	63	822,120	81,182	1,276,282	0	2,098,401	81,182	0	0	0	81,182	81,182	0	2027		
2028	64	788,640	82,806	1,340,096	0	2,128,/36	82,806	0	0	0	82,806	82,806	0	2028		
2029	66	710.435	86 151	1,407,100	0	2187890	86 151	0	0	0	86 151	86 151	0	2029		
2031	67	665 187	87 874	1,551,328	0	2216 514	87 874	0	0	0	87 874	87 874	ő	2031		
2032	68	615,466	89,632	1,628,894	0	2,244,360	89,632	0	0	0	89,632	89,632	0	2032		
2033	69	560,969	91,425	1,710,339	0	2.271,308	91,425	0	0	0	91,425	91,425	0	2033		
2034	70	544,407	50,220	1,795,856	0	2,340,263	50,220	0	43,863	(830)	93,253	93,253	0	2034		
2035	71	525,958	51,114	1,885,649	0	2,411,606	51,114	0	44,960	(955)	95,118	95,118	0	2035		
2036	72	505,499	52,016	1,979,931	0	2,485,430	52,016	0	46,084	(1,079)	97,020	97,020	0	2036		
2037	73	535,829	0	2,078,928	0	2,614,757	0	0	47,236	0	47,236	98,961	(51,725)	2037		
2038	74	567,979	0	2,182,874	0	2,750,853	0	0	48,417	0	48,416	100,940	(52,524)	2038		
2039	75	602,058	0	2,203,282	88,735	2,805,340	88,735	0	49,627	0	138,362	102,959	35,403	2039		
2040	76	638,181	0	2,220,481	92,966	2,858,662	92,966	0	50,868	0	143,833	105,018	38,815	2040		
2041	77	676,472	0	2,234,541	96,964	2,911,013	96,964	0	52,139	0	149,104	107,118	41,985	2041		
2042	/8	/1/,060	756 993	2,244,698	290.224	2,901,/58	1 127 117	E15 201	33,443	(94 503)	2 004 261	1 922 202	45,/52	2042	l ·	
			/ 30,083		300,234		1,137,117	515,201	430,035	(04,093)	2,004,361	1,022,302	102,058			

Step 11: Display Options: Click on the green display option button underneath the Structured Income Planning Heading.

	Doe. John															PREPARED BY	DEMO ADVISOR
Clear Device Particle Proceed Particle Control Particle				1												INITIAL PLAN DATE	01/01/2023
Expression Add Account Accounts Secretion Accounts Accounts Account IRA Income Accounts Teled regarded Accounts Accounts Accounts Accounts Accounts Income Accounts Income Accounts Income Income Accounts Interview Interview Interview Interview Interview Interview Interview Interview Interview	CLIENT DASHBOARD ST	RUCTURED INCOM	ME PLANNING	CASH FLC	OW AND TAX AL	OVISOR A	SSET ALLOCAT	ION AND NET	WORTH G	RAPHS RE	PORTS T	OOLS			8	REVISED PLAN DATE	02/13/2025
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Cited Cited <th< td=""><td>City Cours Connect Add</td><td></td><td></td><td></td><td>dd Tarrat E</td><td>dit on Add Co.</td><td>Disa</td><td>ou Ontinun</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th<>	City Cours Connect Add				dd Tarrat E	dit on Add Co.	Disa	ou Ontinun									
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Betting the initial Plan Date in a SIPS Plan Account Account Income Planning Honzon Querer Non-Qualified Account IRA Incomes Incomes Were Beneficial Regulared accounts Income Account Income Account Incomes Were Beneficial Regulared accounts Income Account Income Account Income Account Income BEGULAR RMD accounts reter turn bittal amount 675,000 John Rd 1,075,000 Subtrait Manage Incomes Inferector Inferector Inferector Inferector Inferector Intel and Inferector Inferector Inferector Intel and Inferector Inferector Intel and Inferector Intel and																	
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Account Account Incomes Planning Horizon 20 years Non-Qualified Account IRA Incomes Approximate and the second Distribution Monese Approximate and the second Income Approximate and the second Income Approximate and the second Income Approximate and the second Approximate			8				JK.										
Planning Horizon 20 years ~ Non-Qualified Account IRA Incomes Approx Distribution Approx may Approx Taget After Tax Income Income Accounts Income Accounts Planned Distribution John Weges John Taget After Tax Income Income Accounts Income Accounts Distribution Weges John State After Tax Income Income After Tax Income After Tax </td <td></td> <td colspan="11">Planning 20 word V</td> <td></td> <td></td> <td></td> <td></td> <td></td>		Planning 20 word V															
Induction Intervention Intervention <td></td> <td>Planning</td> <td>20 years 🗸</td> <td>Non-Quali</td> <td>fied Account</td> <td></td> <td>RA</td> <td></td> <td></td> <td>Inco</td> <td>mes 📈</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>		Planning	20 years 🗸	Non-Quali	fied Account		RA			Inco	mes 📈						
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REGULAR RMD ecross all accounts initial amount borus %; total RMD 2022 Feb (LAR RMD borus %; c75,000	Total required	Year	John	Account	Income	Account	Income	Accounts	Planned	John	John SS	Approx	After Tax	After Tax	Income	Year	
Hebbolar RMD Ind Return 58 6.00 John John Infractor Manage Manage Manage Manage Manage Infractor Infr	View Beneficial RMD					E 00 0		Total	Distribution	Wages		Тах	Income	Target	Gap		
Dorous % total RMD Dorous % wrbonus 0.00 % br/stal RMD 0.00 % b	REGULAR RMD	net return	58	675,000		5.00 %	John IRA	1675.000	Subtotal	Managa	Manage	Manage		Manage	from total		
total RMD w/bonus 675,00 Marges 1,000,00 Marges 1,675,000 income 2.80 % 2.80 % 2.80 % 2.00 % target target 0 2023 59 715,500 0 1,065,000 0 1,765,500 0 125,000 0 (20,076) 104,924 75,000 2,924 2023 0 2025 61 803,936 0 1,175,7525 0 196,1651 0 132,050 0 (20,488) 199,502 78,030 31,472 2025 0 2027 63 822,120 81,182 127,5282 0 2,098,401 81,182 0 0 0 84,462 0 2026 62,066 0 2026 0 2,098,401 81,182 0 0 0 84,462 0 2,028,464 0 2,081,474 0 0 0 84,462 0 2,026,444 0 2,026,444 0 2,026 0 0 0	lohn	honus %		0.00 %		0.00 %	John inc	1,070,000	of account	Infl Factor	Infl Factor	manage		Infl Factor	income to		
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0 2024 60 758,430 0 1125,00 0 126,030 0 127,250 0 201,380 107,362 76,500 30,662 2024 0 2025 61 803,936 0 1,157,625 0 1,961,561 0 130,050 0 (20,548) 109,502 76,500 30,472 2025 0 2026 62 852,172 0 1,215,566 0 2,067,678 0 132,651 0 (20,546) 11,168 79,591 32,094 2025 0 2028 64 78,640 82,060 0 2,128,597 84,462 0 0 0 84,462 44,462 0 2029 65 751,447 84,462 140,7100 0 2,158,597 84,462 0 0 0 84,462 44,462 0 2030 66 760,438 66 140,396 0 2,216,514 87,874 0 0 0 88,632 0	0	2023	59	715.500	0	1.050.000	0	1.765.500	0	125.000	0	(20.076)	104.924	75.000	29.924	2023	
0 2025 61 803,936 0 1157,625 0 1961,561 0 103,050 0 (20,548) 109,502 78,030 31,472 2025 0 2026 62 852,172 0 1215,550 0 20,676 0 132,651 0 (20,646) 111,62 61,182 0 2007 0 2027 63 822,120 81,182 127,62,82 0 20,98,401 81,182 0 0 0 81,182 61,182 0 2027 0 2029 64 788,640 82,606 1,40,096 0 2,185,597 84,462 0 0 0 84,462 0 0 0 86,151 0 2,203 0 2030 66 71,0435 85,151 1,477,455 0 2,216,248 0 0 0 0 86,151 86,151 0 2,224,360 99,532 0 0 0 0 0	0	2024	60	758,430	0	1,102,500	0	1,860,930	0	127,500	0	(20,138)	107,362	76,500	30,862	2024	
0 2026 62 852,172 0 121,506 0 2067,78 0 132,651 0 20,966 111,685 79,591 32,094 2026 0 2027 63 822,102 811,82 0 2094,01 81,182 0 0 0 0 81,865 79,591 32,094 2026 0 2028 64 788,640 82,806 0 2,18,597 82,806 0 0 0 82,806 62,806 62,806 62,806 0 2023 0 2029 65 751,497 84,462 147,100 0 2,18,597 84,462 0 0 0 84,462 94,462 0 2030 66 71,0435 85,151 147,455 0 2,216,514 87,874 0 0 0 0 87,874 87,874 0 2031 0 2032 69 560,969 91,425 1,710,339 0 2,241,508 91,414 </td <td>0</td> <td>2025</td> <td>61</td> <td>803,936</td> <td>0</td> <td>1,157,625</td> <td>0</td> <td>1,961,561</td> <td>0</td> <td>130,050</td> <td>0</td> <td>(20,548)</td> <td>109,502</td> <td>78,030</td> <td>31,472</td> <td>2025</td> <td></td>	0	2025	61	803,936	0	1,157,625	0	1,961,561	0	130,050	0	(20,548)	109,502	78,030	31,472	2025	
0 2027 63 822,120 81,182 127,628 0 2.098,401 81,182 0 0 0 81,182 81,182 0 2027 0 2028 64 786,40 82,806 0 0 21,85,97 64,462 0 0 0 81,182 81,182 0 2027 0 2030 65 751,497 84,462 1,407,100 0 2,187,890 86,151 0 0 0 84,662 84,462 0 2030 0 2031 67 665,187 87,474 50 2,217,530 84,462 0 0 0 84,652 84,462 0 2031 0 2033 66 615,466 89,632 1,224,330 89,432 0 2,244,360 89,632 0 0 91,425 91,425 0 2033 0 2034 70 54,4407 50,220 1,70,839 0 2,241,263 50,220	0	2026	62	852,172	0	1,215,506	0	2,067,678	0	132,651	0	(20,966)	111,685	79,591	32,094	2026	
0 2028 64 788,640 82,806 1340,096 0 2,128,736 82,806 0 0 0 82,806 82,806 0 2029 0 2029 65 751,477 84,662 1477,455 0 2,187,890 86,151 0 0 0 84,462 84,462 0 2030 0 2031 67 665,187 87,774 1,551,328 0 2,216,514 87,874 0 0 0 84,651 86,151 0 2030 0 2032 66 656,646 89,652 1,528,940 0 2,244,540 89,632 0 0 98,651 98,7874 0 2031 0 2033 69 560,969 91,425 1,703,39 0 2,241,306 89,432 0 0 0 98,253 91,425 0 2033 0 2035 71 525,958 51,114 1,885,649 0 2,411,606 5	0	2027	63	822,120	81,182	1,276,282	0	2,098,401	81,182	0	0	0	81,182	81,182	0	2027	
0 2029 65 751,497 84,462 1407,100 0 2185,597 84,462 0 0 0 84,462 84,462 0 2029 0 2030 65 751,497 84,462 1407,100 0 2185,597 84,462 0 0 0 84,462 84,462 0 2029 0 2031 67 665,187 87,574 1,551,328 0 2,216,514 87,874 0 0 88,632 0 0 89,632 89,632 0 2031 0 2033 69 560,969 91,425 171,0339 0 2,271,308 91,425 0 0 91,425 91,425 0 2032 0 2034 70 544,407 50,220 1,79,393 0 2,211,006 51,141 0 44,960 (95) 95,118 91,225 0 0 2035 0 2035 71 255,255 51,114 188,548<	0	2028	64	788,640	82,806	1,340,096	0	2,128,736	82,806	0	0	0	82,806	82,806	0	2028	
0 2030 66 710.435 86,151 1.477,455 0 2.187,890 86,151 0 0 0 0 86,151 86,151 0 2.203 0 2031 67 665,178 87,871 1.551,328 0 2.216,541 87,874 0 0 0 86,151 86,151 0 2.203 0 2032 68 615,466 89,632 1.628,894 0 2.244,360 89,632 0 0 99,632 99,632 0 2.033 0 2033 69 540,407 57,220 1.770,389 0 2.274,360 89,632 0 0 99,632 99,632 0 2.033 0 2034 70 544,407 50,220 1.79,836 0 2.440,263 50,220 0 43,863 (830) 93,253 93,253 0 2.033 0 2035 71 55,549 52,016 1.979,931 0 2.445,430	0	2029	65	751,497	84,462	1,407,100	0	2,158,597	84,462	0	0	0	84,462	84,462	0	2029	
0 2031 67 665,187 87,874 1,551,328 0 2,216,514 87,874 0 0 0 0 87,874 87,874 0 2031 0 2032 68 615,466 89,632 1,528,804 98,632 0 0 0 87,874 0 2032 0 2033 69 560,969 91,425 1,710,339 0 2,241,308 91,425 0 0 0 99,3253 93,253 0 2033 0 2035 71 525,956 51,114 1,886,649 0 2,411,606 51,114 0 44,960 (95,5) 95,118 93,253 0 2033 0 2035 71 525,956 51,114 1,886,49 0 2,411,606 51,114 0 44,960 (95,5) 95,118 93,253 0 2035 0 2037 73 53,829 0 2,445,430 52,016 0 44,8450	0	2030	66	710,435	86,151	1,477,455	0	2,187,890	86,151	0	0	0	86,151	86,151	0	2030	
0 2032 66 615,466 89,652 170,389 0 2,244,360 89,632 0 0 0 99,632 99,632 00 2032 0 2033 69 560,969 91,425 1710,339 0 2,274,360 89,632 0 0 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,425 91,235 91,118 95,118 95,118 0 2033 0 2035 71 555,955 51,114 188,644 0 2,411,666 51,114 0 44,960 (95,5) 95,118 95,118 0 2035 0 2035 72 505,499 50,16 1,979,913 0 2,416,430 52,016 0 44,960 (95,5) 95,118 0 2036 0 2037 73 53,629 0 2,178,287 0 2,416,303 0<	0	2031	67	665,187	87,874	1,551,328	0	2,216,514	87,874	0	0	0	87,874	87,874	0	2031	
0 2033 69 560,969 91,425 1710,339 0 2.271,308 91,425 0 0 0 0 0 91,425 91,425 0 2.203 0 2034 70 544,407 502,201 1798,856 0 2.427,308 91,425 0 0 0 0 0 91,425 91,425 0 2.203 0 2035 71 525,595 51,114 1.885,649 0 2.411,606 51,114 0 44,960 (955) 95,118 95,118 0 2.035 0 2035 72 505,499 52,016 1.979,931 0 2.485,430 52,016 0 44,946 (10,79) 97,020 97,020 0 2.035 0 2037 73 55,529 0 2.175,853 0 0 44,841 10.0940 (51,725) 2.037 0 2038 74 567,979 0 2.128,274 0.0 <	0	2032	68	615,466	89,632	1,628,894	0	2,244,360	89,632	0	0	0	89,632	89,632	0	2032	
0 2034 70 544,407 50,220 1,798,856 0 2,340,263 50,220 0 43,863 (830) 93,253 93,253 0 2034 0 2035 71 255,955 51,114 1,885,649 0 2,411,606 51,114 0 44,960 (955) 95,118 95,118 0 2035 0 2036 72 505,499 52,016 1,979,931 0 2,485,430 52,016 0 44,960 (955) 95,118 95,118 0 2036 0 2037 73 555,829 0 2,018,929 0 2,415,430 52,016 0 44,960 (955) 95,118 0 2037 0 2037 73 555,297 0 2,789,282 0 2,716,853 0 0 48,417 0 48,416 100,940 (52,524) 2038 88,735 2039 75 602,058 0 2,220,418 92,966	0	2033	69	560,969	91,425	1,710,339	0	2,271,308	91,425	0	0	0	91,425	91,425	0	2033	
0 2035 71 525,958 51,114 1.88,649 0 2,411,606 51,114 0 44,960 (955) 95,118 95,118 0 2035 0 2036 72 555,829 0 2,078,928 0 2,441,506 50 44,960 (955) 95,118 95,118 0 2035 0 2037 73 535,829 0 2,078,928 0 2,614,757 0 0 47,236 0 47,236 98,961 (51,725) 2037 0 2038 74 567,979 0 2,128,274 0 2,750,853 0 0 48,417 0 44,9461 100,940 (52,24) 2033 92,966 2039 75 60,205 0 2,203,40 88,735 2,005,40 88,735 0 49,627 0 133,842 100,940 (52,24) 2033 92,966 2040 76 638,181 0 2,220,481 92,966	0	2034	70	544,407	50,220	1,795,856	0	2,340,263	50,220	0	43,863	(830)	93,253	93,253	0	2034	
0 2036 72 505,499 52,016 1,379,931 0 2,485,430 52,016 0 46,084 (1,079) 97,020 97,020 0 2036 0 2037 73 535,829 0 2,018,975 0 0 47,236 0 97,020 97,020 0 2036 0 2038 74 567,979 0 2,182,874 0 2,750,853 0 0 48,417 0 48,416 100,940 (52,24) 2039 92,966 2040 76 638,181 0 2,220,481 92,966 292,966 0 56,868 0 143,833 105,018 38,815 2040 96,964 2041 77 66,472 0 2,246,454 96,964 0 52,143 0 149,104 107,118 41,985 2041 101,570 2042 78 77,706 0 2,246,58 101,570 0 53,443 0 155,013 <	0	2035	71	525,958	51,114	1,885,649	0	2,411,606	51,114	0	44,960	(955)	95,118	95,118	0	2035	
0 2037 73 535,829 0 2/19,928 0 2/14,757 0 0 47,236 0 47,236 98,961 (51,729) 2037 0 2038 74 567,979 0 2,182,874 0 2,504,757 0 0 47,236 0 47,236 98,961 (51,729) 2037 88,735 2039 75 602,058 0 2,182,874 0 2,504,83 0 48,417 0 48,416 100,940 (52,524) 2038 92,966 2040 76 638,181 0 2,203,282 88,735 2,89,564 94,627 0 138,362 102,959 35,403 2039 96,964 2040 76 638,181 0 2,204,81 92,966 2,92,966 0 52,139 0 149,104 107,118 41,985 2041 96,964 2041 77 676,472 0 2,234,541 96,964 96,964 0 52,13	0	2036	72	505,499	52,016	1,979,931	0	2,485,430	52,016	0	46,084	(1,079)	97,020	97,020	0	2036	
0 2038 74 567979 0 2182874 0 24907 0 48417 0 48446 100,940 (52,224) 2039 88,735 2039 75 602,058 0 2203,282 88,735 0 49,627 0 138,862 102,999 35,403 2039 92,966 2040 76 638,181 0 220,481 92,966 2858,662 92,966 0 50,868 0 143,833 105,018 38,815 2040 96,964 2041 77 676,472 0 224,454 96,964 0 52,139 0 149,104 107,118 41,985 2041 101,570 2042 78 77,7060 0 224,458 101,570 2961,750 0 53,443 0 155,013 109,221 45,752 2042	0	2037	73	535,829	0	2,078,928	0	2,614,757	0	0	47,236	0	47,236	98,961	(51,725)	2037	
b8,/35 2/139 /5 60/2/108 0 2/2/0,8/2 2/8/3/6 2/8/3/6 0 4/8/27 0 1/8/3/62 1/2/5/95 3/3/6/3 2/2/3 92,966 2/040 76 6/8,181 0 2/2/2/6/8 6 0 5/8/6 0 1/8/3/62 1/2/5/95 3/3/6/3 2/039 96,964 2041 77 6/6/4/2 0 2/2/4/8 9/9/66 2/2/4/6 9/9/66 0 5/3/43 105/018 3/8/8/15 2/04 101,570 2/042 78 77/7/0/60 0 2/2/4/8 101,570 2/9/6/7 0 5/3/43 0 15/5/14 10/9/18 4/9/27 0 14/9/27 0 14/9/27 0 1/9/18 1/9/18 2/04/27 101,570 2/042 78 71/70/60 0 2/2/4/57 0 1/9/57 0 1/9/57 1/9/27 1/9/27 1/9/27 1/9/27 1/9/27 1/9/27 1/9/27 1/9/27 1/9/27 1/9/27 </td <td>0</td> <td>2038</td> <td>74</td> <td>567,979</td> <td>0</td> <td>2,182,874</td> <td>0</td> <td>2,750,853</td> <td>0</td> <td>0</td> <td>48,417</td> <td>0</td> <td>48,416</td> <td>100,940</td> <td>(52,524)</td> <td>2038</td> <td></td>	0	2038	74	567,979	0	2,182,874	0	2,750,853	0	0	48,417	0	48,416	100,940	(52,524)	2038	
92,900 2040 70 638,181 0 2,224,481 92,906 2,8285,062 92,996 0 50,858 0 143,853 105,018 38,815 2040 96,964 2041 77 676,472 0 2,234,541 96,964 2,911,013 96,964 0 52,139 0 149,104 107,118 41,985 2041 101,570 2042 78 77,066 0 2,244,698 101,570 2,961,758 101,570 0 53,443 0 155,013 109,261 45,752 2042	88,/35	2039	75	602,058	0	2,203,282	88,/35	2,805,340	88,/35	0	49,627	0	138,362	102,959	35,403	2039	
50,504 2041 77 570 2042 78 77,006 0 2,244,698 101,570 2,961,758 101,570 0 52,143 0 149,104 107,118 41,985 2041	92,966	2040	76	676 470	0	2,220,481	92,966	2,858,662	92,966	0	50,868	0	143,833	105,018	38,815	2040	
	90,904	2041	79	717.060	0	2,234,541	90,904	2,911,013	90,964	0	52,139	0	149,104	107,118	41,985	2041	
756.883 380.234 1137.117 515.201 436.635 (84.593) 2.004.361 1.922.202 192.059	101,570	2042	/0	/17,000	756.893	2,244,098	380 224	2,901,758	1 137 117	515 201	436 625	(84 592)	2 004 361	1 822 302	45,752	2042	

Step 12: View Plan Years: Click on the green View Plan Years button in the column display option box.

Column Display Options Hide RMD Checks Hide I	Income Riders View	Death Benefit	View % Distri	bution View	Comparison	View Tax R	tes View Pla	an Years		
Account	and Income Grou	iping						Group Setup		
	Accounts							Accounts		
	Group 1	Group 2	Group 3	Group 4	Group 5		Title		Color	
Non-Qualified Account	۲	0	0	0	0	Group 1	Accounts			Sel
IRA	۲	0	0	0	0	Group 2				Sel
	terrer and the second sec					Group 3				Sel
John Wages	incomes	\circ	\circ	\circ	\circ	Group 4				Sel
John SS		0	0	0	0	Group 5			_	Sel
000000		0	0	0	0			Incomer		
Account or income groups must be created in the sequential or	rder from left to right a	s they appear i	in the Income I	Plan.			Title	licomes	Color	
You may have to re-order accounts using the Edit Scenario fund	ction to achieve the ser	quence you wa	int for your acc	ount/income	groups.	Group 1	Incomes			Sel
Reordering or adding accounts or incomes on the Edit Scenario	function requires that	the above gro	up information	be reset.		Group 2	linoonico			Sel
						Group 3				Sel
Reset Condense All Uncondense All						Group 4				Sel
						Group 5				Sel
						Reset T	tle / Colors	Copy Setup To All Scenarios		
						L				_
Return With Grouping Return Without Grouping										
Return with Grouping Return without Grouping										

Step 13: Structured Income Plan: The Display years will automatically be switched to whichever option you have selected.



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