

View Comparison Function on the Asset Allocation and Net Worth Landing Page

01/12/2026 11:31 am EST

On the Asset Allocation and Net Worth page, you can easily compare two different scenarios if you'd like to compare different asset allocation startegies. The View Comparison button allows you to compare two different scenarios side by side. If you are investigating a certain planning strategy you can see the difference using the pie chart visual. Both of the visual aids are at the starting point of the plan.

Below are two different hypothetical scenarios that will be compared side by side. The first hypothetical scenario that is located on the left hand side of the screen is the hypothetical example used in the Asset Allocation and Net Worth article. The 2nd scenario located on the right hand side of the screen. Below are the breakdown of the asset allocation numbers:

Scenario from the Asset Allocation and Net Worth Article:

- Brokerage Account: \$3,000,000 Asset Allocation: Aggressive (Red); Hypothetical return 5%
- ROTH 401 (k): \$1,500,00 Asset Allocation: Moderate (Yellow); Hypothetical return 4%
- IRA: \$250,000 Assest Allocation: Conservative (Blue); Hypothetical return 2%

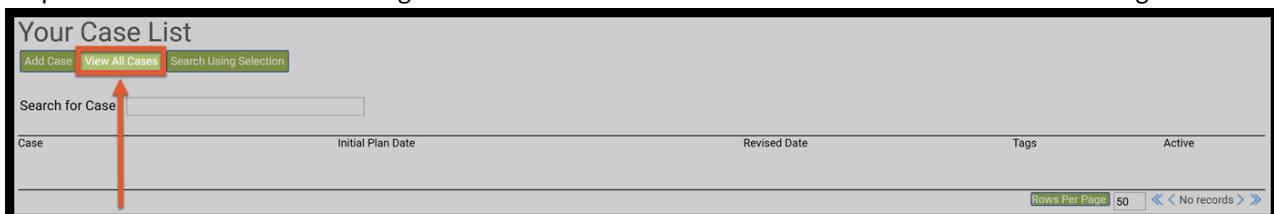
Scenario used for comparison:

- Brokerage Account: \$2,500,000 Asset Allocation: Conservatice (Blue) Hypothetical return 2%
- HSA (Health Savings Account: \$100,000 Asset Allocation: Conservative (Blue) Hypothetical return 2%
- ROTH 401 (k): \$1,000,000 Asset Allocation: Moderate (Yellow) Hypothetical return 3%
- IRA: \$125,000 Asset Allocation; Aggressive (Red) Hypothetical return 5%

To learn about comparing different asset allocation and net worths and graphs see articles:

- [Asset Allocation and Net Worth](#)
- [View Comparison Function on the Asset Allocation and Net Worth Landing Page](#)
- [Projected Account Value Graph](#)
- [Planned Yearly Income Graph](#)

Step 1: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



The screenshot shows a 'Your Case List' page with a table of client cases. The table has columns for Case, Initial Plan Date, Revised Date, Tags, and Active. At the top left, there are buttons for 'Add Case', 'View All Cases' (which is highlighted with a red box and an arrow pointing to it), and 'Search Using Selection'. Below these buttons is a search bar labeled 'Search for Case'.

Case	Initial Plan Date	Revised Date	Tags	Active
John Doe	2023-01-01	2023-01-01		Active

Rows Per Page: 50 | << < No records > >>

Step 2: Case: Click on the Client account you would like to open. (John Doe)

Your Case List

Add Case View All Cases Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
Doe, John	01/01/2025	08/12/2025	Demo Advisor	<input checked="" type="checkbox"/> Del
			Demo Advisor	<input checked="" type="checkbox"/> Del
			Demo Advisor	<input checked="" type="checkbox"/> Del
			Demo Advisor	<input checked="" type="checkbox"/> Del

Rows Per Page: 50 | << Page 1 of 1 >>

Step 3: Asset Allocation and Net Worth: Click on the Asset Allocation and Net Worth heading underneath the Clients name.

Doe, John

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: 01/01/2025
REVISED PLAN DATE: 09/09/2025

Client Information

Case Title: Doe, John Edit

Description:

Selection tags: Demo Advisor Active

Client one	Last: Doe Date of birth: 01/01/1963 Current age: 62	First: John Initial plan age: 62 Retirement age: 70	Client two	Last: <input type="text"/> Date of birth: <input type="text"/> Current age: <input type="text"/>	First: <input type="text"/> Short name: John Gender: Male	Initial plan age: <input type="text"/> Retirement age: <input type="text"/>
CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJECTIVES						RECOMMENDATIONS ADVISOR NOTES DISCLOSURE

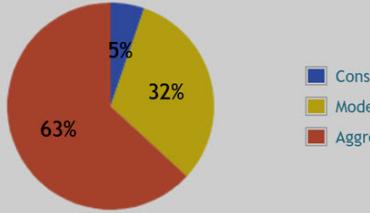
Step 4: View Comparison: Click on the green View Comparison button under the Asset Allocation and Net Worth subheading.

Asset Allocation and Net Worth

[View Comparison](#)

Scenario

Asset Allocation and Net Worth



- Conservative
- Moderate
- Aggressive

Your overall risk level for this scenario is Moderately Aggressive

Monetary Assets

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
Brokerage Account	John	NQ	Aggr	Aggressive	\$3,000,000
ROTH 401(k)	John	Roth	Mod	Moderate	\$1,500,000
IRA	John	IRA	Cons	Conservative	\$250,000
Total					\$4,750,000

Major Assets

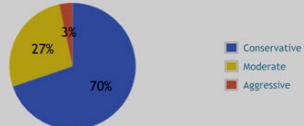
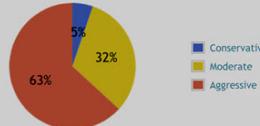
Description	Value	Amount owed	Net
Home	\$500,000		\$500,000
RV	\$100,000		\$100,000
Subtotal			\$600,000

Summary

Your Asset Allocation and Net Worth has a total net worth of \$5,350,000

Step 5: Scenario: Use the down caret arrow to select the correct scenario if the default is incorrect.

Asset Allocation and Net Worth

[Hide Comparison](#)Compare [View Comparison Function on the Asset Allocation and Net Worth Landing Page](#)Scenario [Asset Allocation and Net Worth](#)

- Conservative
- Moderate
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Your overall risk level for this scenario is Moderately Aggressive

Your overall risk level for this scenario is Moderately Conservative

Monetary Assets

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
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IRA	John	IRA	Cons	Conservative	\$250,000
Total					\$4,750,000

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
Brokerage Account	John	NQ	Cons	Conservative	\$2,500,000
ROTH 401(k)	John	NQ	Cons	Conservative	\$100,000
IRA	John	IRA	Mod	Moderate	\$1,000,000
	John	Roth	Aggr	Aggressive	\$125,000
Total					\$3,725,000

Major Assets

Description	Value	Amount owed	Net
Home	\$500,000		\$500,000
RV	\$100,000		\$100,000
Subtotal			\$600,000

Summary

Your Asset Allocation and Net Worth has a total net worth of \$5,350,000 Your View Comparison Function on the Asset Allocation and Net Worth Landing Page has a total net worth of \$4,325,000

Step 6: Scenario Explanation: SIPS will automatically show a pie chart and state what the asset allocation is.

Doe, John

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 09/09/2025

Asset Allocation and Net Worth

Hide Comparison

Scenario: Asset Allocation and Net Worth

Compare: View Comparison Function on the Asset Allocation and Net Worth Landing Page

Your overall risk level for this scenario is Moderately Aggressive

70% Conservative, 32% Moderate, 5% Aggressive

Your overall risk level for this scenario is Moderately Conservative

70% Conservative, 27% Moderate, 3% Aggressive

Monetary Assets

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
Brokerage Account	John	NQ	Aggr	Aggressive	\$3,000,000
ROTH 401(k)	John	Roth	Mod	Moderate	\$1,500,000
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				Total	\$4,750,000

Monetary Assets

Description	Owner	Tax Qual	Risk Level	Allocation	Balance
BA	John	NQ	Cons	Conservative	\$2,500,000
HSA	John	NQ	Cons	Conservative	\$100,000
ROTH 401(k)	John	IRA	Mod	Moderate	\$1,000,000
IRA	John	Roth	Aggr	Aggressive	\$125,000
				Total	\$3,725,000

Major Assets

Description	Value	Amount owed	Net
Home	\$500,000		\$500,000
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		Subtotal	\$600,000

Summary

Your Asset Allocation and Net Worth has a total net worth of \$5,350,000

Summary

Your View Comparison Function on the Asset Allocation and Net Worth Landing Page has a total net worth of \$4,325,000

Step 7: Monetary Assets: SIPS should automatically display the monetary assets.

Doe, John

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 09/09/2025

Asset Allocation and Net Worth

Hide Comparison

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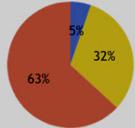
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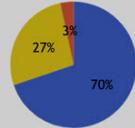
Your View Comparison Function on the Asset Allocation and Net Worth Landing Page has a total net worth of \$4,325,000

Step 8: Major Assets: These non-spendable assets are listed on the Client Dashboard Assets page under the Property List and the Other Assets & Liabilities. Although they only appear on the left side, SIPS factors them into both scenarios.

Asset Allocation and Net Worth

[Hide Comparison](#)Scenario [Asset Allocation and Net Worth](#)Compare [View Comparison Function on the Asset Allocation and Net Worth Landing Page](#)

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Monetary Assets

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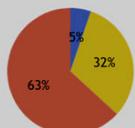
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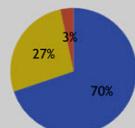
Your View Comparison Function on the Asset Allocation and Net Worth Landing Page has a total net worth of \$4,325,000

Step 9: Summary: SIPS will automatically generate a written summary stating the client's total net worth. This amount includes monetary and major assets combined.

Asset Allocation and Net Worth

[Hide Comparison](#)Scenario [Asset Allocation and Net Worth](#)Compare [View Comparison Function on the Asset Allocation and Net Worth Landing Page](#)

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If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: support@planscout.com.