Replicate Discovery Data As A Planning Scenario

10/14/2025 2:44 pm EDT

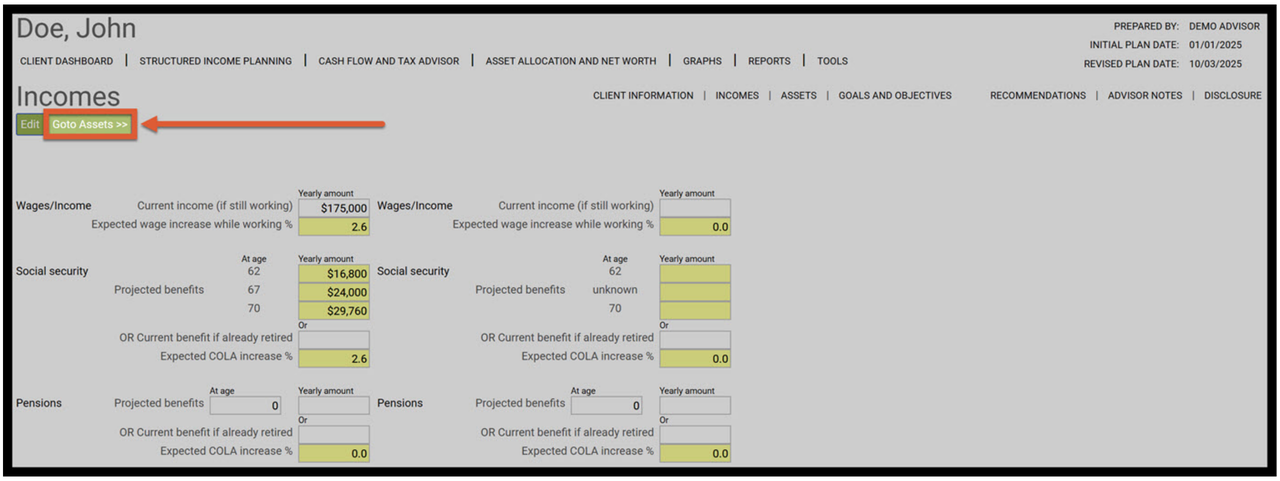
The Create Planning Scenario tool is accessible from two locations: the Tools Pages (labeled as 'Replicate Discovery Data as a Planning Scenario') and the Assets Page (labeled as 'Create Planning Scenario'). This guide provides simple, step-by-step instructions for using this function, starting from the client dashboard incomes page.

To learn about Tools see articles:

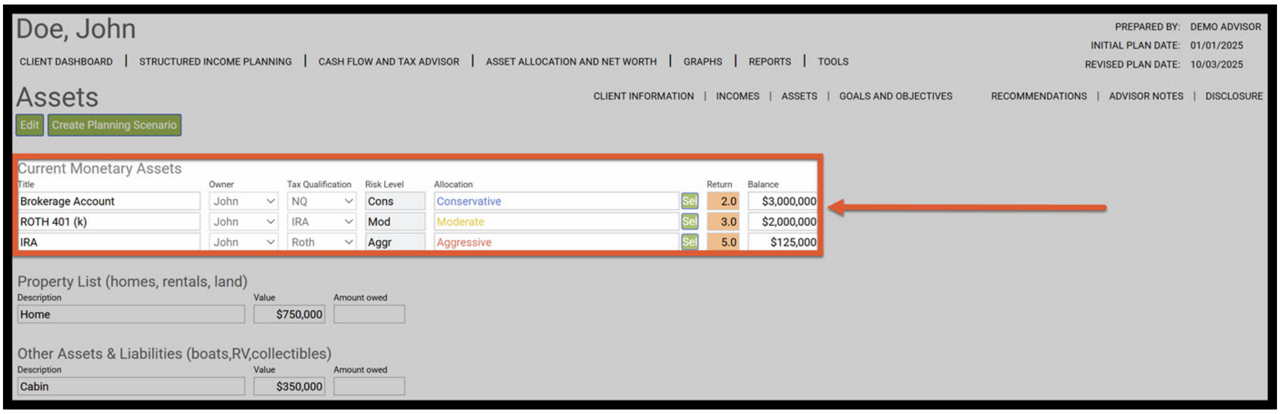
- Replicate Discovery Data as a Planning Scenario
- How to Use The Retirement Fiscal Cliff Function for an Existing Client
- Using The Retirement Fiscal Cliff Function for a New Client

Step 1: Incomes: Note the incomes page.

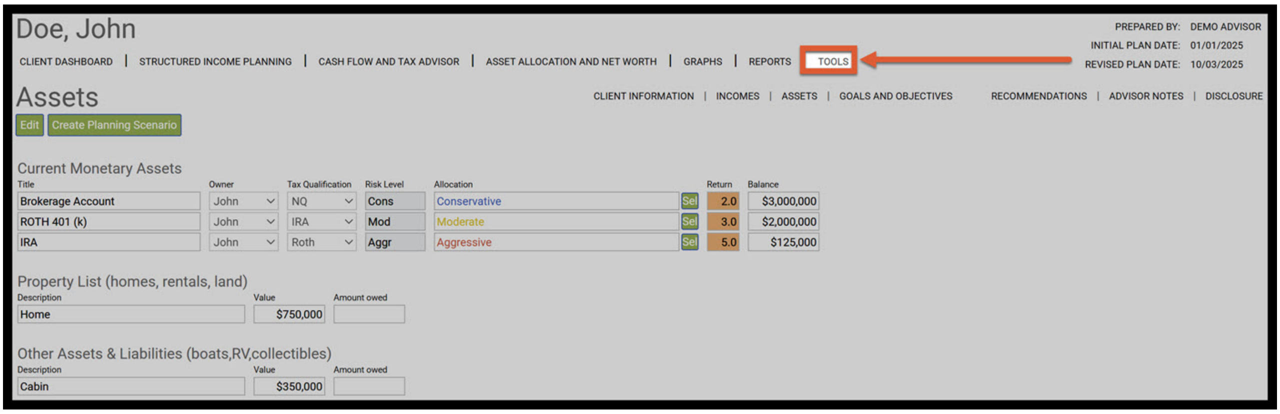
Step 2: GoTo Assets: Click on the green Goto Assets button under the Incomes heading.



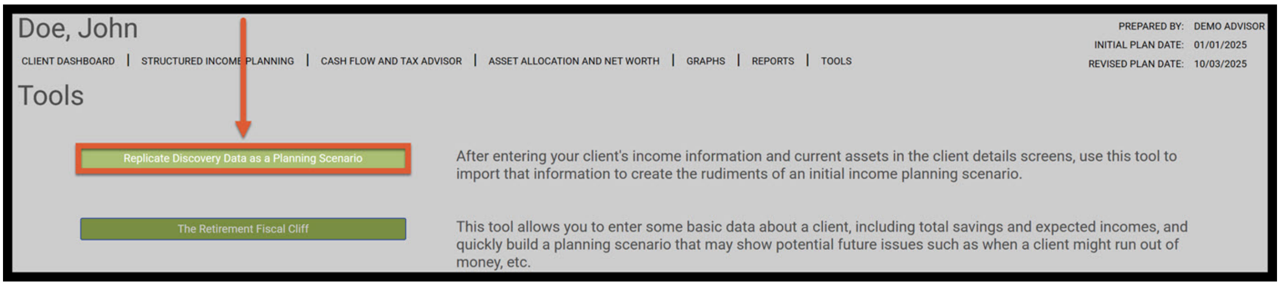
Step 3: Assets: Note the Assets page.



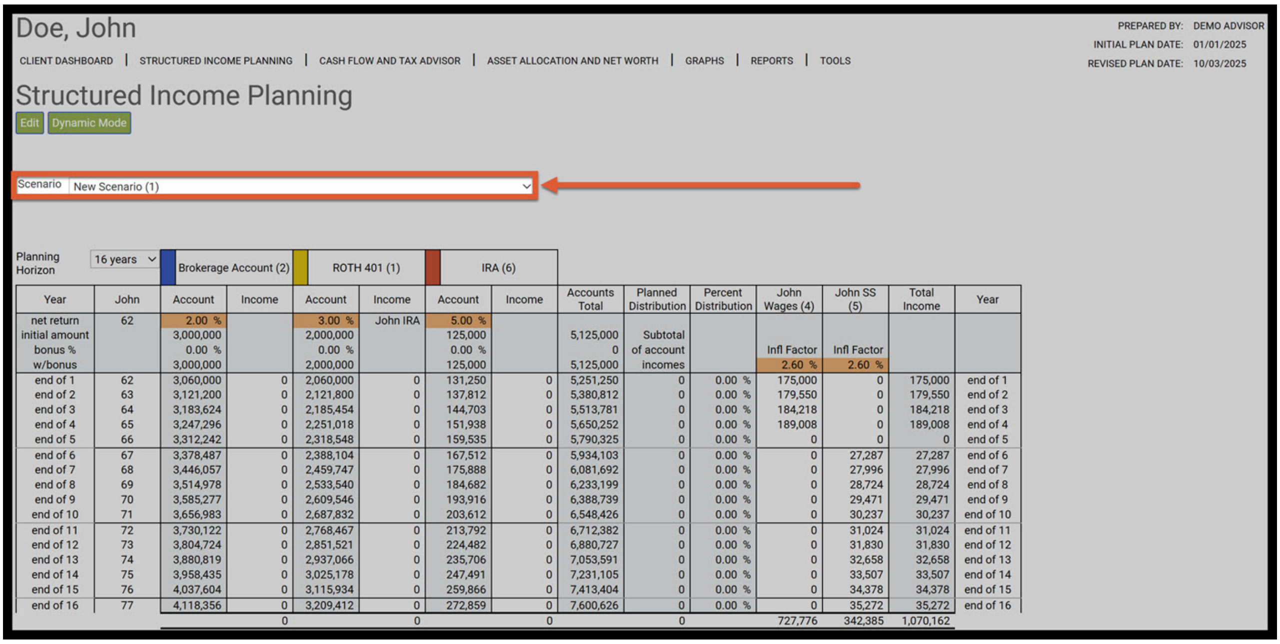
Step 4: Tools: Click the Tools link under the client's name.



Step 5: Replicate Discovery Data as a Planning Scenario: Click the green "Replicate Discovery Data as a Planning Scenario" button.



Step 6: New Scenario: You will automatically be taken back to the Structured Income Planning page, and a new scenario will be shown.



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: 10/03/2025

Structured Income Planning

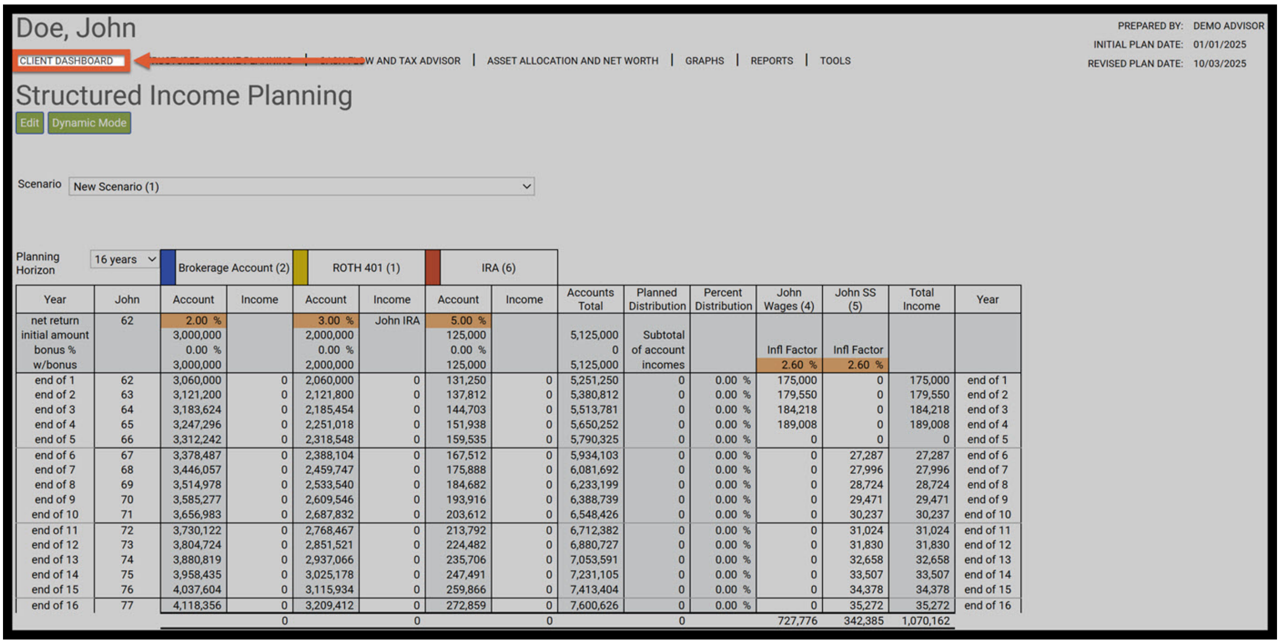
Edit Dynamic Mode

Scenario New Scenario (1)

Planning Horizon 16 years

		Brokerage Account (2)		ROTH 401 (1)		IRA (6)								
Year	John	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	John Wages (4)	John SS (5)	Total Income	Year
net return	62	2.00 %		3.00 %	John IRA	5.00 %								
initial amount		3,000,000		2,000,000		125,000		5,125,000	Subtotal					
bonus %		0.00 %		0.00 %		0.00 %		0	of account		Infl Factor	Infl Factor		
w/bonus		3,000,000		2,000,000		125,000		5,125,000	incomes		2.60 %	2.60 %		
end of 1	62	3,060,000	0	2,060,000	0	131,250	0	5,251,250	0	0.00 %	175,000	0	175,000	end of 1
end of 2	63	3,121,200	0	2,121,800	0	137,812	0	5,380,812	0	0.00 %	179,550	0	179,550	end of 2
end of 3	64	3,183,624	0	2,185,454	0	144,703	0	5,513,781	0	0.00 %	184,218	0	184,218	end of 3
end of 4	65	3,247,296	0	2,251,018	0	151,938	0	5,650,252	0	0.00 %	189,008	0	189,008	end of 4
end of 5	66	3,312,242	0	2,318,548	0	159,535	0	5,790,325	0	0.00 %	0	0	0	end of 5
end of 6	67	3,378,487	0	2,388,104	0	167,512	0	5,934,103	0	0.00 %	0	27,287	27,287	end of 6
end of 7	68	3,446,057	0	2,459,747	0	175,888	0	6,081,692	0	0.00 %	0	27,996	27,996	end of 7
end of 8	69	3,514,978	0	2,533,540	0	184,682	0	6,233,199	0	0.00 %	0	28,724	28,724	end of 8
end of 9	70	3,585,277	0	2,609,546	0	193,916	0	6,388,739	0	0.00 %	0	29,471	29,471	end of 9
end of 10	71	3,656,983	0	2,687,832	0	203,612	0	6,548,426	0	0.00 %	0	30,237	30,237	end of 10
end of 11	72	3,730,122	0	2,768,467	0	213,792	0	6,712,382	0	0.00 %	0	31,024	31,024	end of 11
end of 12	73	3,804,724	0	2,851,521	0	224,482	0	6,880,727	0	0.00 %	0	31,830	31,830	end of 12
end of 13	74	3,880,819	0	2,937,066	0	235,706	0	7,053,591	0	0.00 %	0	32,658	32,658	end of 13
end of 14	75	3,958,435	0	3,025,178	0	247,491	0	7,231,105	0	0.00 %	0	33,507	33,507	end of 14
end of 15	76	4,037,604	0	3,115,934	0	259,866	0	7,413,404	0	0.00 %	0	34,378	34,378	end of 15
end of 16	77	4,118,356	0	3,209,412	0	272,859	0	7,600,626	0	0.00 %	0	35,272	35,272	end of 16
			0		0		0		0		727,776	342,385	1,070,162	

Step 7: Client Dashboard: Click the Client Dashboard link under the client's name.



Doe, John

CLIENT DASHBOARD | W AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 10/03/2025

Structured Income Planning

Edit Dynamic Mode

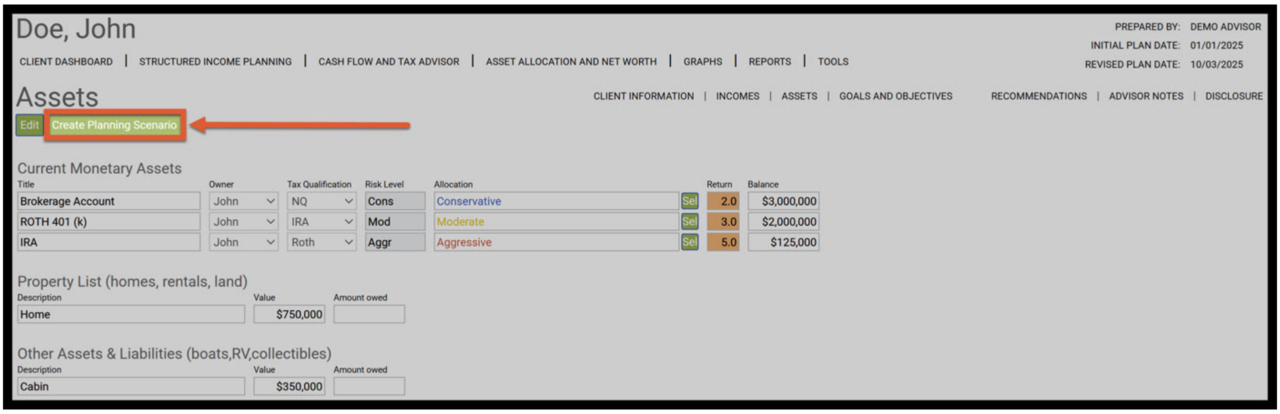
Scenario New Scenario (1)

Planning Horizon 16 years

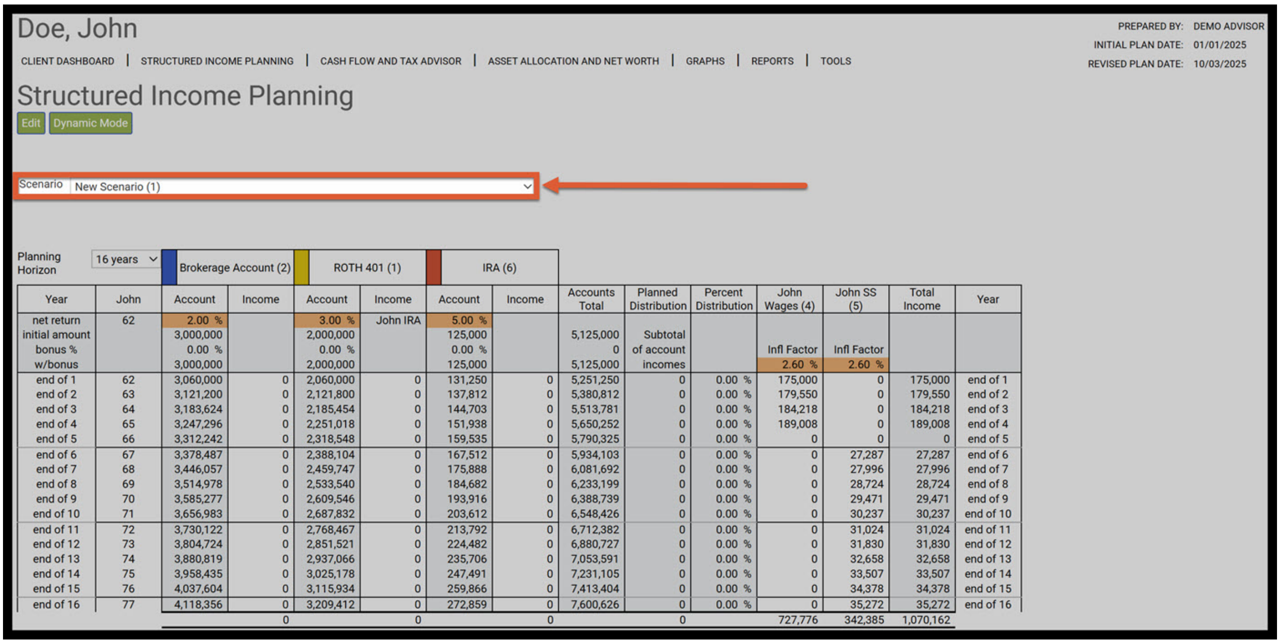
		Brokerage Account (2)		ROTH 401 (1)		IRA (6)								
Year	John	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	John Wages (4)	John SS (5)	Total Income	Year
net return	62	2.00 %		3.00 %	John IRA	5.00 %								
initial amount		3,000,000		2,000,000		125,000		5,125,000	Subtotal					
bonus %		0.00 %		0.00 %		0.00 %		0	of account		Infl Factor	Infl Factor		
w/bonus		3,000,000		2,000,000		125,000		5,125,000	incomes		2.60 %	2.60 %		
end of 1	62	3,060,000	0	2,060,000	0	131,250	0	5,251,250	0	0.00 %	175,000	0	175,000	end of 1
end of 2	63	3,121,200	0	2,121,800	0	137,812	0	5,380,812	0	0.00 %	179,550	0	179,550	end of 2
end of 3	64	3,183,624	0	2,185,454	0	144,703	0	5,513,781	0	0.00 %	184,218	0	184,218	end of 3
end of 4	65	3,247,296	0	2,251,018	0	151,938	0	5,650,252	0	0.00 %	189,008	0	189,008	end of 4
end of 5	66	3,312,242	0	2,318,548	0	159,535	0	5,790,325	0	0.00 %	0	0	0	end of 5
end of 6	67	3,378,487	0	2,388,104	0	167,512	0	5,934,103	0	0.00 %	0	27,287	27,287	end of 6
end of 7	68	3,446,057	0	2,459,747	0	175,888	0	6,081,692	0	0.00 %	0	27,996	27,996	end of 7
end of 8	69	3,514,978	0	2,533,540	0	184,682	0	6,233,199	0	0.00 %	0	28,724	28,724	end of 8
end of 9	70	3,585,277	0	2,609,546	0	193,916	0	6,388,739	0	0.00 %	0	29,471	29,471	end of 9
end of 10	71	3,656,983	0	2,687,832	0	203,612	0	6,548,426	0	0.00 %	0	30,237	30,237	end of 10
end of 11	72	3,730,122	0	2,768,467	0	213,792	0	6,712,382	0	0.00 %	0	31,024	31,024	end of 11
end of 12	73	3,804,724	0	2,851,521	0	224,482	0	6,880,727	0	0.00 %	0	31,830	31,830	end of 12
end of 13	74	3,880,819	0	2,937,066	0	235,706	0	7,053,591	0	0.00 %	0	32,658	32,658	end of 13
end of 14	75	3,958,435	0	3,025,178	0	247,491	0	7,231,105	0	0.00 %	0	33,507	33,507	end of 14
end of 15	76	4,037,604	0	3,115,934	0	259,866	0	7,413,404	0	0.00 %	0	34,378	34,378	end of 15
end of 16	77	4,118,356	0	3,209,412	0	272,859	0	7,600,626	0	0.00 %	0	35,272	35,272	end of 16
			0		0		0		0		727,776	342,385	1,070,162	

Step 8: Assets: Click on the Assets link.

Step 9: Create Planning Scenario: Click on the green "Create Planning Scenario" button under the Assets heading.



Step 10: Scenario: You will automatically be taken to the Structured Income Planning page, and the new scenario shown will be identical to the one created from the Tools page.



		Brokerage Account (2)		ROTH 401 (1)		IRA (6)								
Year	John	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	John Wages (4)	John SS (5)	Total Income	Year
net return	62	2.00 %		3.00 %	John IRA	5.00 %								
initial amount		3,000,000		2,000,000		125,000		5,125,000	Subtotal					
bonus %		0.00 %		0.00 %		0.00 %		0	of account		Infl Factor	Infl Factor		
w/bonus		3,000,000		2,000,000		125,000		5,125,000	incomes		2.60 %	2.60 %		
end of 1	62	3,060,000	0	2,060,000	0	131,250	0	5,251,250	0	0.00 %	175,000	0	175,000	end of 1
end of 2	63	3,121,200	0	2,121,800	0	137,812	0	5,380,812	0	0.00 %	179,550	0	179,550	end of 2
end of 3	64	3,183,624	0	2,185,454	0	144,703	0	5,513,781	0	0.00 %	184,218	0	184,218	end of 3
end of 4	65	3,247,296	0	2,251,018	0	151,938	0	5,650,252	0	0.00 %	189,008	0	189,008	end of 4
end of 5	66	3,312,242	0	2,318,548	0	159,535	0	5,790,325	0	0.00 %	0	0	0	end of 5
end of 6	67	3,378,487	0	2,388,104	0	167,512	0	5,934,103	0	0.00 %	0	27,287	27,287	end of 6
end of 7	68	3,446,057	0	2,459,747	0	175,888	0	6,081,692	0	0.00 %	0	27,996	27,996	end of 7
end of 8	69	3,514,978	0	2,533,540	0	184,682	0	6,233,199	0	0.00 %	0	28,724	28,724	end of 8
end of 9	70	3,585,277	0	2,609,546	0	193,916	0	6,388,739	0	0.00 %	0	29,471	29,471	end of 9
end of 10	71	3,656,983	0	2,687,832	0	203,612	0	6,548,426	0	0.00 %	0	30,237	30,237	end of 10
end of 11	72	3,730,122	0	2,768,467	0	213,792	0	6,712,382	0	0.00 %	0	31,024	31,024	end of 11
end of 12	73	3,804,724	0	2,851,521	0	224,482	0	6,880,727	0	0.00 %	0	31,830	31,830	end of 12
end of 13	74	3,880,819	0	2,937,066	0	235,706	0	7,053,591	0	0.00 %	0	32,658	32,658	end of 13
end of 14	75	3,958,435	0	3,025,178	0	247,491	0	7,231,105	0	0.00 %	0	33,507	33,507	end of 14
end of 15	76	4,037,604	0	3,115,934	0	259,866	0	7,413,404	0	0.00 %	0	34,378	34,378	end of 15
end of 16	77	4,118,356	0	3,209,412	0	272,859	0	7,600,626	0	0.00 %	0	35,272	35,272	end of 16
			0		0		0		0		727,776	342,385	1,070,162	

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.