

# Incomes

09/16/2024 11:09 am EDT

Below is a step-by-step guide for entering in the data into the incomes page.

Step 1: Edit: Click on the edit button below the Incomes heading.

The screenshot shows the SIPS Incomes page. At the top, there are navigation links: YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below that, a header bar contains: CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS. On the right side of the header, it says: PREPARED BY: [blacked out], INITIAL PLAN DATE: [blacked out], REVISED PLAN DATE: [blacked out]. The main heading is "Incomes" with sub-links: CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE. Below the heading are two buttons: "Edit" (highlighted with a red arrow) and "Goto Assets >>". The main content area is divided into two columns. Each column has sections for "Wages/Income", "Social security", and "Pensions". Each section contains input fields for "Current income (if still working)", "Expected wage increase while working %", "Projected benefits" (with "At age" dropdowns for 62, 67, 70), "OR Current benefit if already retired", and "Expected COLA increase %". The "Expected COLA increase %" field in the right column is pre-filled with "0.0". At the bottom left is the SIPS logo and "Solutions of Retirement Systems". At the bottom right are links for "PRIVACY POLICY" and "TERMS OF USE".

Step 2: Monthly/Yearly Amounts: Click on which radio button you would like to enter the data for, monthly or yearly. The default is set at yearly amounts.

This screenshot is identical to the previous one, but with the "Enter monthly amounts" radio button unselected and the "Enter yearly amounts" radio button selected (indicated by a blue dot). A red arrow points to the "Enter yearly amounts" radio button. The "Save" and "Cancel" buttons are now visible below the "Edit" button. The rest of the page content remains the same.

Step 3: Wages/Income: Click on whichever amounts you would like to use for filtering in the data for the wages/income section. The column on the left correlate with client one, the column on the right correlate with client two. If a client does not provide the wage increase, use whichever percentage you would like to use. When filtering in the percentage amount the numerical number can be entered as a whole number you do not need to factor the percentage number into the text box, SIPS will take care of this mathematical equation. Once done tab into the social security box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

## Incomes

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %			Expected wage increase while working %		0.0

  

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	67		Projected benefits	66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		0.0

  

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

SIPS Retirement Planning System

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**Step 4: Social Security:** If your client has not started collecting social security you just need to enter one numerical number into the projected benefits column. Once you click save, SIPS will automatically filter in the remaining numbers for the projected benefits. If your client is already retired and collecting social security, enter the numerical amount in the text box that correlates with the client's current age. Enter in whichever numerical amount you would like to use for COLA percentage. Once done, tab into the pensions text box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

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## Incomes

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %			Expected wage increase while working %		0.0

  

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	67		Projected benefits	66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		0.0

  

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

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**Step 5: Pensions:** If your client is collecting a pension start in the text box that stated projected benefit. Filter in the data of the numerical age and type in the yearly amount. If your client is already retired and collecting on their pension, filter in the numerical amount. Enter in whichever numerical amount you would like to use for COLA percentage. Once done, click on the Save button underneath the Incomes heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

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## Incomes

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %			Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	62	
	67			66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		0.0

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Step 6: Save: After filtering in all the data and it looks good, you click the Save button underneath the Incomes heading. If you need to edit any of the material, click on the text box and edit the data before you click save.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

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## Incomes

[Edit](#) [Save](#) [Cancel](#)

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %			Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	62	
	67			66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		0.0

SIPS Retirement Planning System

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Step 7: Goto Asset: After you click the save button, click on the GoTo Assets button underneath the Incomes heading to proceed to the Assets page.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
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## Incomes

[Edit](#) [Go to Assets >>](#)

<p><b>Wages/Income</b></p> <p>Current income (if still working) <input type="text"/> Yearly amount <input type="text"/></p> <p>Expected wage increase while working % <input type="text"/></p> <p><b>Social security</b></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>At age <input type="text"/></p> <p>Projected benefits <input type="text"/></p> <p>70 <input type="text"/></p> <p>OR Current benefit if already retired <input type="text"/></p> <p>Expected COLA increase % <input type="text"/></p> </td> <td style="width: 50%; vertical-align: top;"> <p>At age <input type="text"/></p> <p>Projected benefits <input type="text"/></p> <p>66 <input type="text"/></p> <p>70 <input type="text"/></p> <p>OR Current benefit if already retired <input type="text"/></p> <p>Expected COLA increase % <input type="text"/></p> </td> </tr> </table> <p><b>Pensions</b></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>At age <input type="text"/></p> <p>Projected benefits <input type="text"/></p> <p>0 <input type="text"/></p> <p>OR Current benefit if already retired <input type="text"/></p> <p>Expected COLA increase % <input type="text"/></p> </td> <td style="width: 50%; 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[PRIVACY POLICY](#) [TERMS OF USE](#)

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)