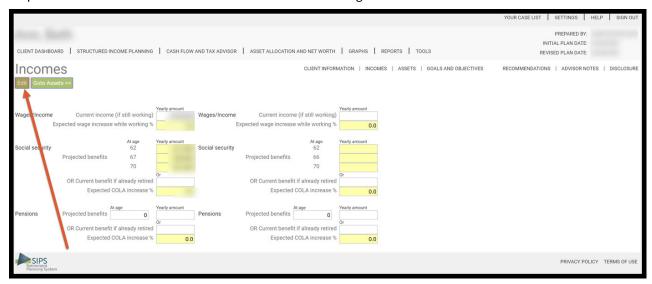
Incomes

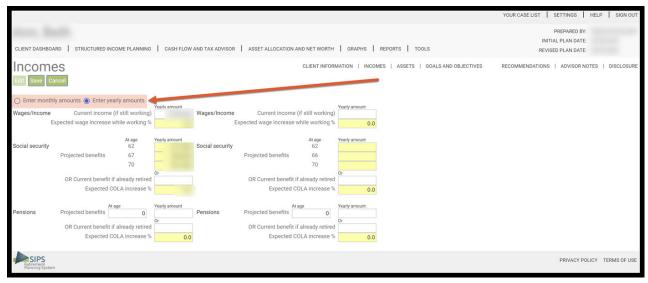
09/16/2024 11:09 am EDT

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

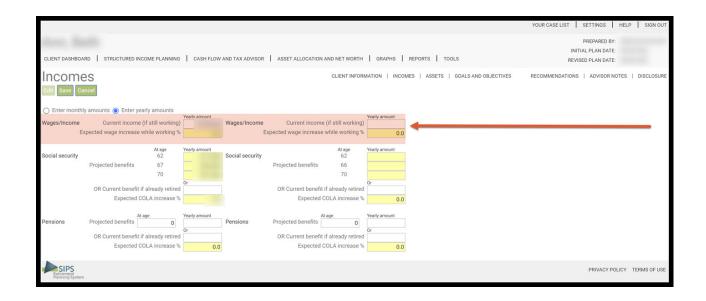
Step 1: Edit: Click on the edit button below the Incomes heading.



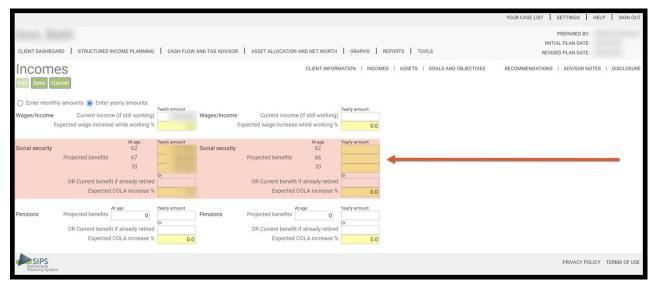
Step 2:Monthly/Yearly Amounts: Click on which radio button you would like to enter the data for, monthly or yearly. The default is set at yearly amounts.



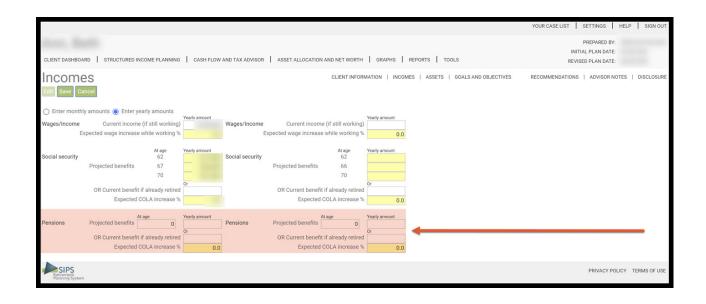
Step 3: Wages/Income: Click on whichever amounts you would like to use for filtering in the data for the wages/income section. The column on the left correlate with client one, the column on the right correlate with client two. If a client does not provide the wage increase, use whichever percentage 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.



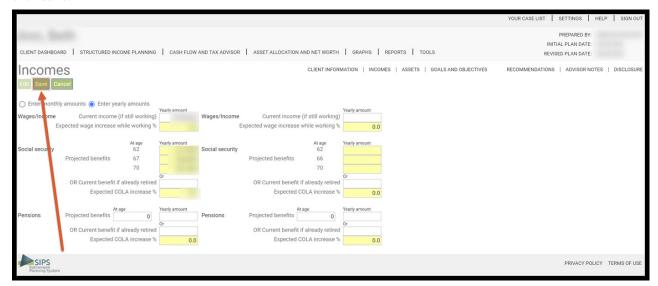
Step 4: Social Security: If your client has not started collecting social security you just need to enter one numerical number into the projected benefits column. Once you click save, SIPS will automatically filter in the remaining numbers for the projected benefits. If your client is already retired 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.



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.



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.



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	ELIST SETTINGS HEL	P SIGN OUT
p											PREPARED BY: INITIAL PLAN DATE:	
CLIENT DASHBO	DARD STRUCTURED INCOME	PLANNING	CASH FLOW A	AND TAX ADVISOR	ASSET ALLOCATION AND	NET WORTH	GRAPHS	REP	PORTS TOOLS		REVISED PLAN DATE:	
Incom Edit Goto As						LIENT INFOR	MATION	NCOMES	ASSETS GOALS AND OBJECTIVE	S RECOMMEN	IDATIONS ADVISOR NOTES	DISCLOSURE
Wages/Income	e Current income (if still Expected wage increase while	ll working)	early amount	Wages/Income	Current income (if s			0.0				
Social security	Projected benefits	At age Yes 62 67 70	early amount	Social security	Projected benefits	At age 62 66 70	Yearly amount					
	OR Current benefit if already retired Expected COLA increase %				OR Current benefit if al Expected COL	*		0.0				
Pensions	Projected benefits OR Current benefit if alrea Expected COLA in	0 Or ady retired	early amount	Pensions	Projected benefits OR Current benefit if al Expected COL			0.0				
SIPS Retirement Planning Syste	em										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