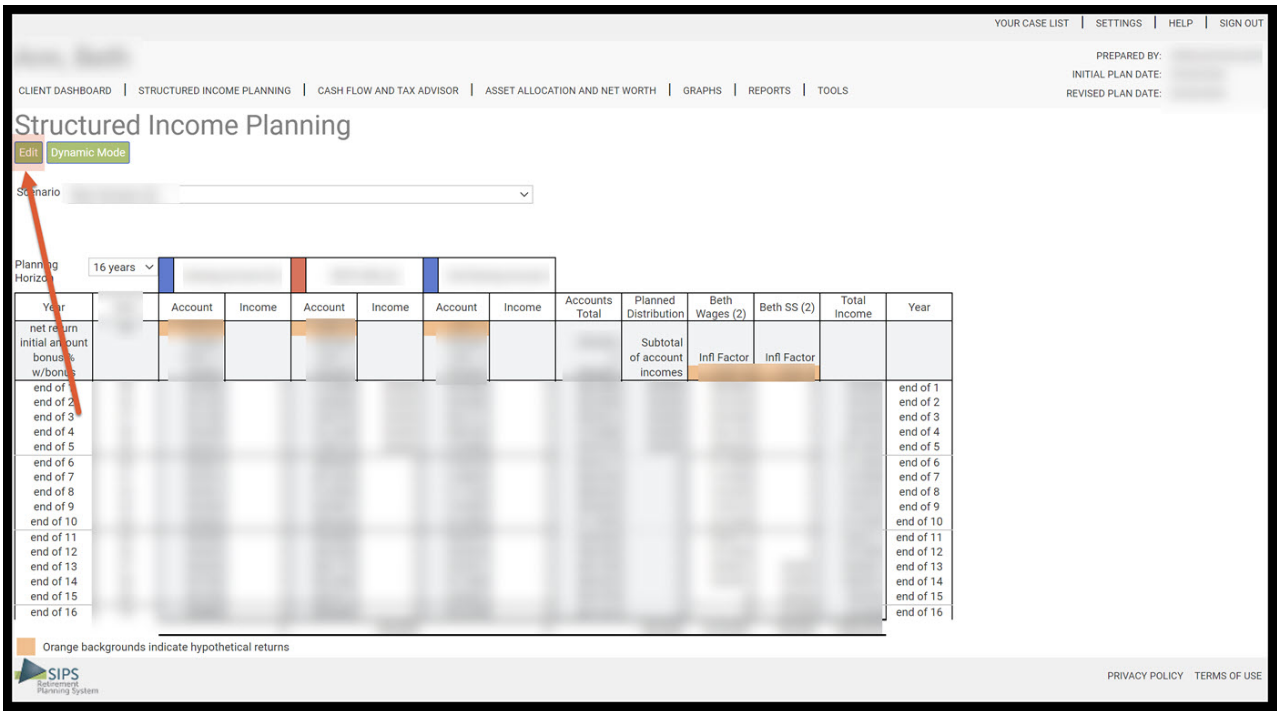
Annual Fixed Withdrawal Function

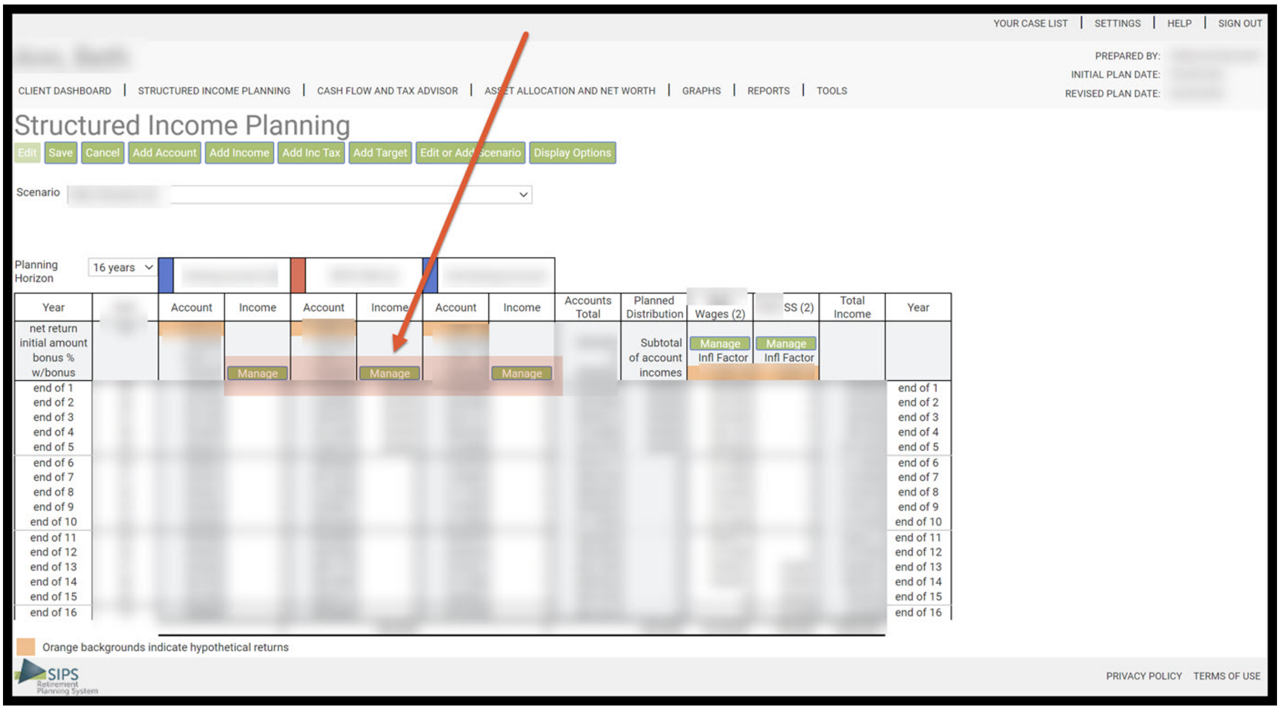
01/12/2026 10:35 am EST

On the structured income planinng page, you have the ability to show deposits or withdrawals from the accounts on the structured income plan. There are multiple ways to do these functions. Below is a step-by-step guide for depositing and/or withdrawing monetary amounts through the annual fixed withdrawal function.

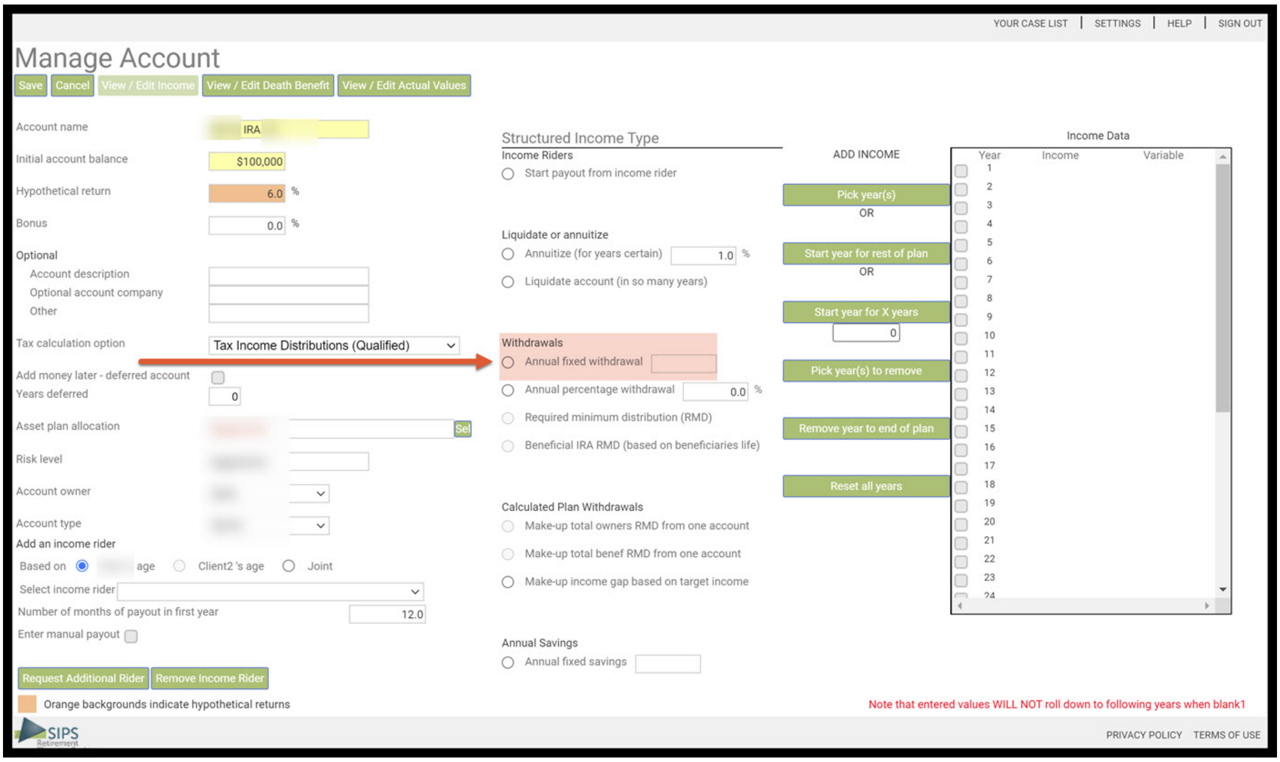
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



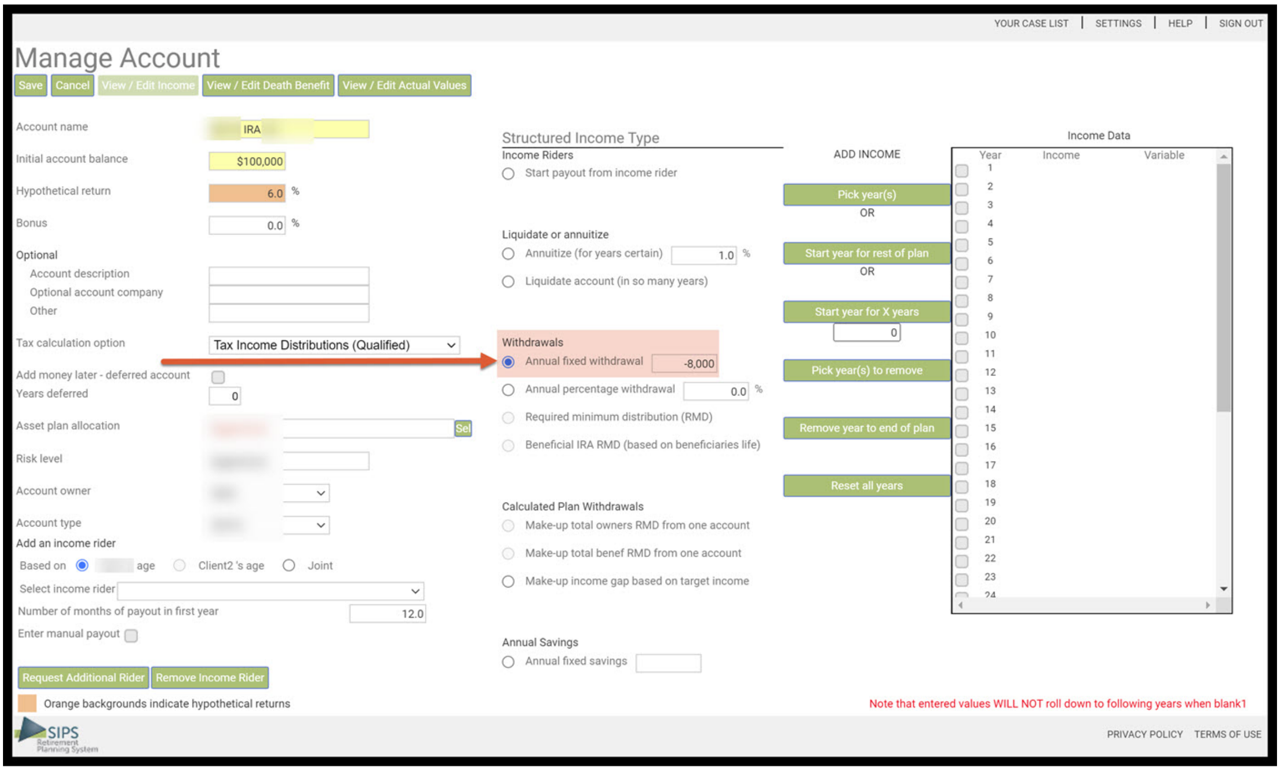
Step 2: Manage: Click on the green Manage button that is located in the incomes column for whichever account you would like to make edits to.



Step 3: Withdrawals: Under the Structured Income Type Column Withdrawals section, click on the radio button next to the annual fixed withdrawal.

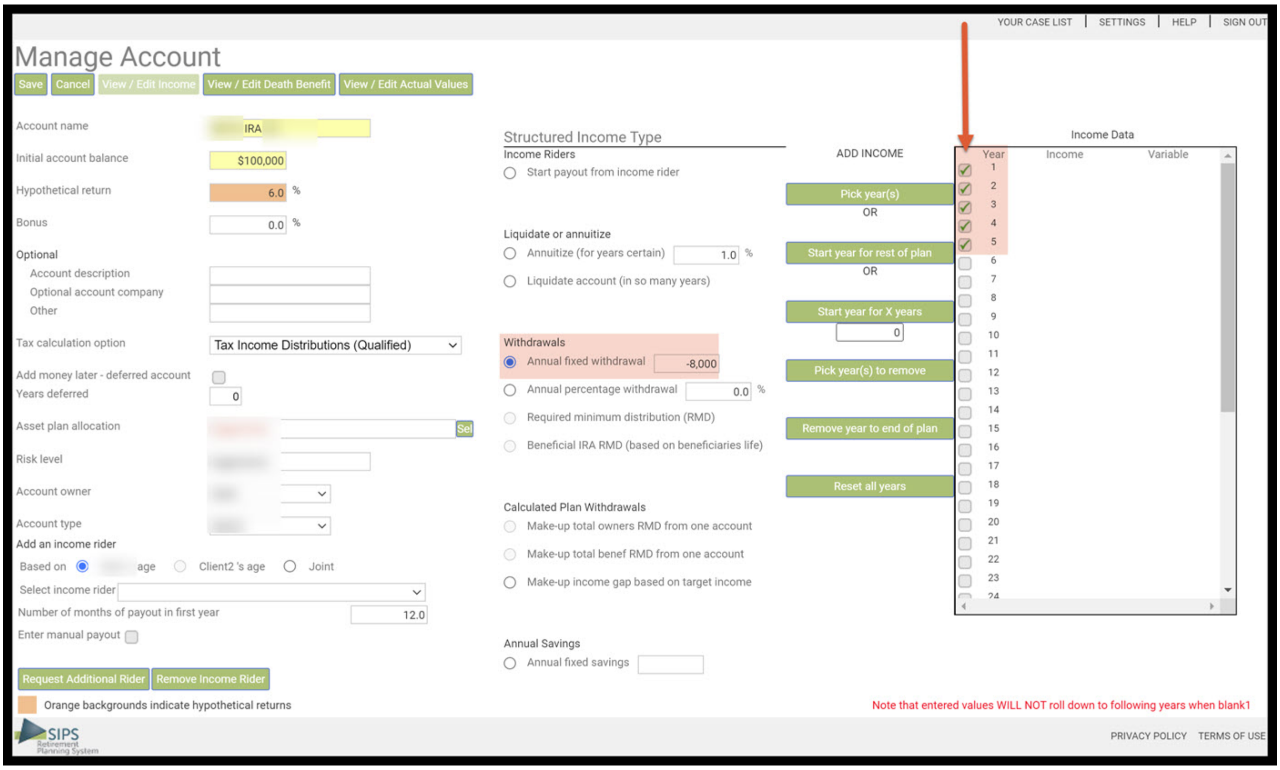


Step 4: Adding a Monetary Addition: To add money into an account, the numerical amount has to start with a negative symbol (-). The numerical number can be typed in with or without a comma, SIPS recognizes both styles of numbers. SIPS does not recognize the dollar mark ($). Type in the monetary amount.

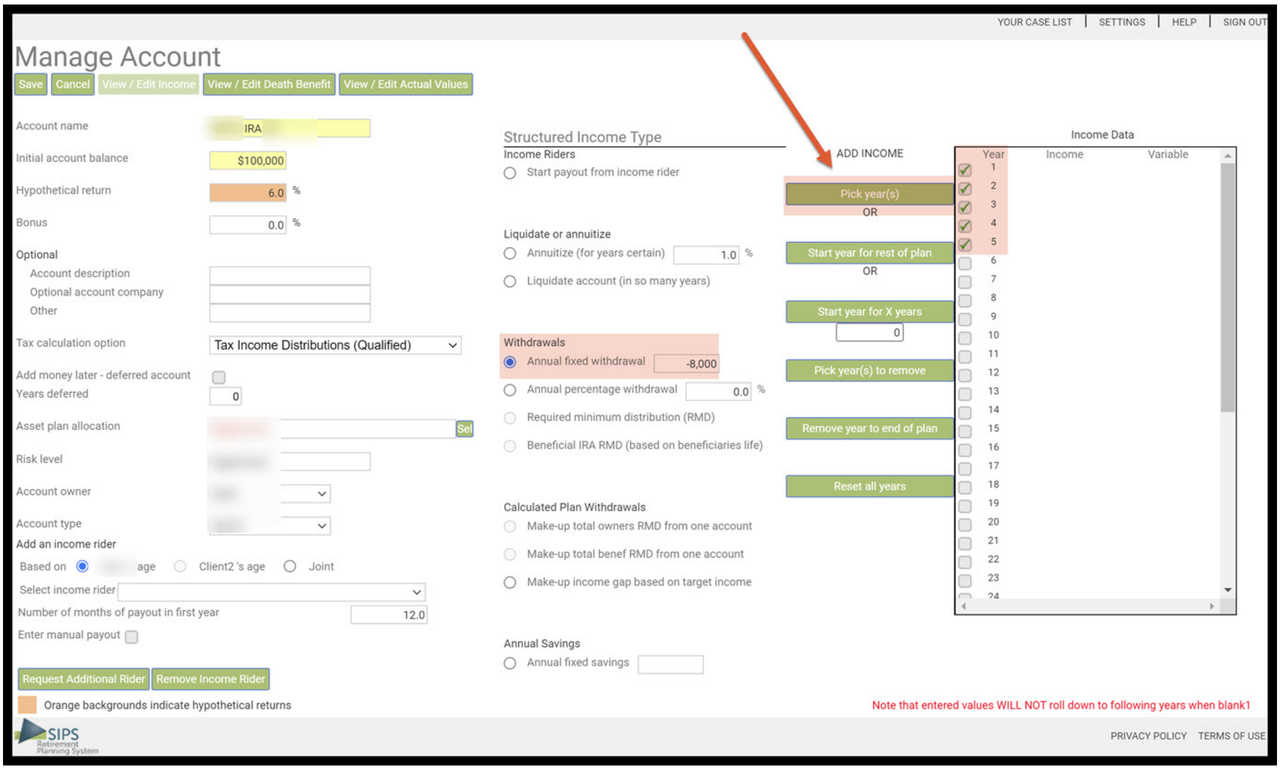


Option A: Pick Years:

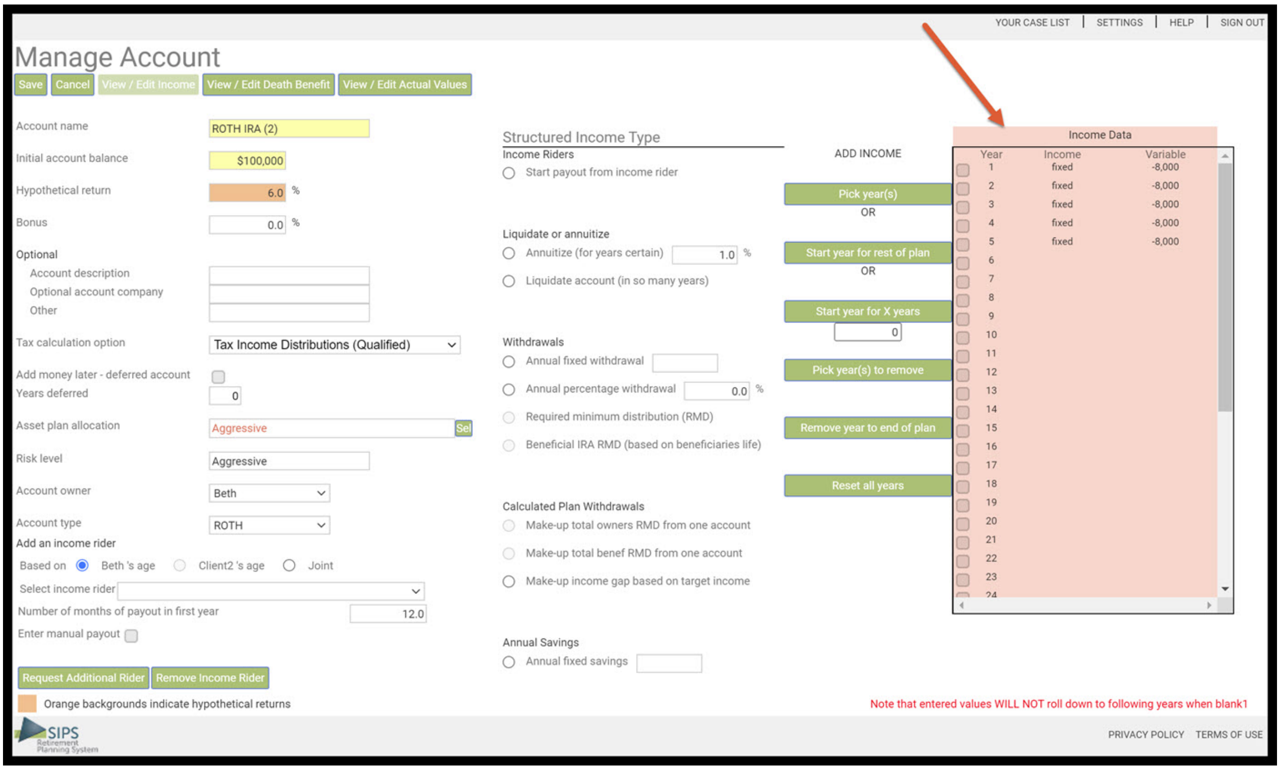
Step 5: Income Data: In the Income Data box click on the numerical year(s) that you would like the monetary addition to be added to.



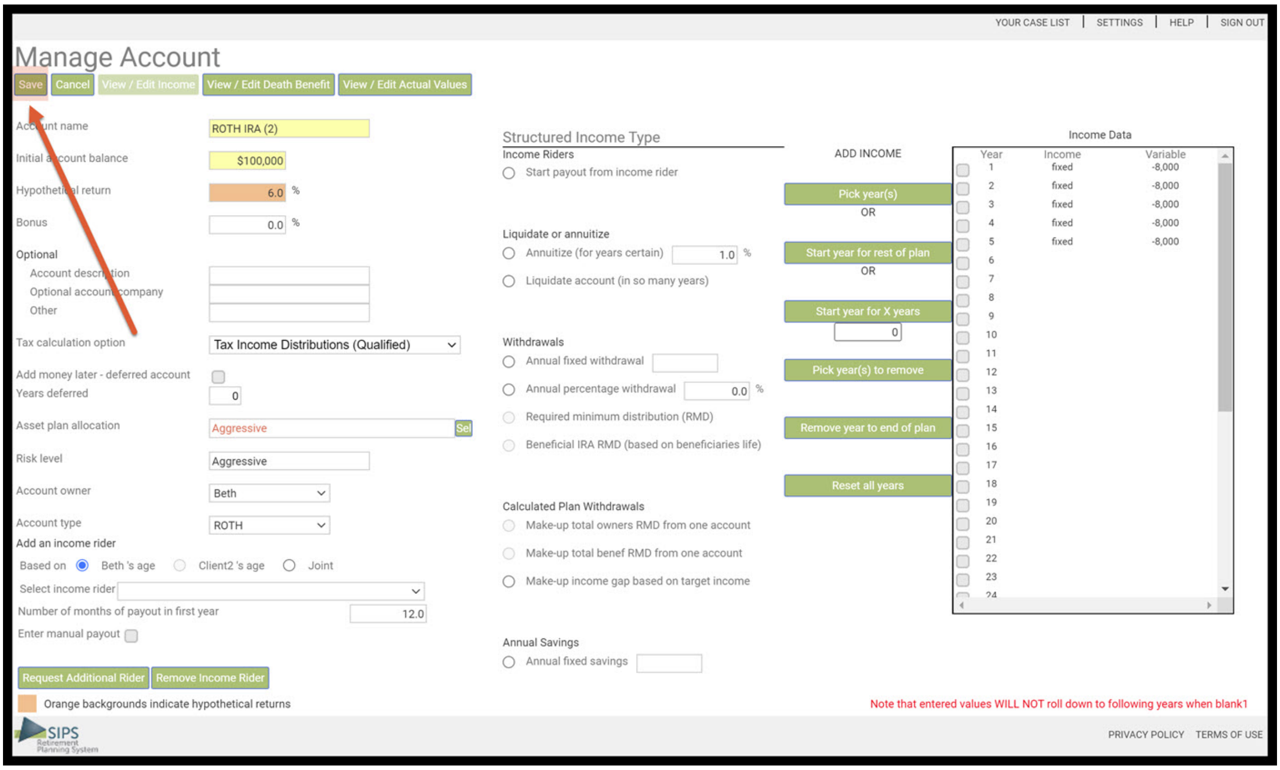
Step 6: Add Income: Click on the green Pick Years button.



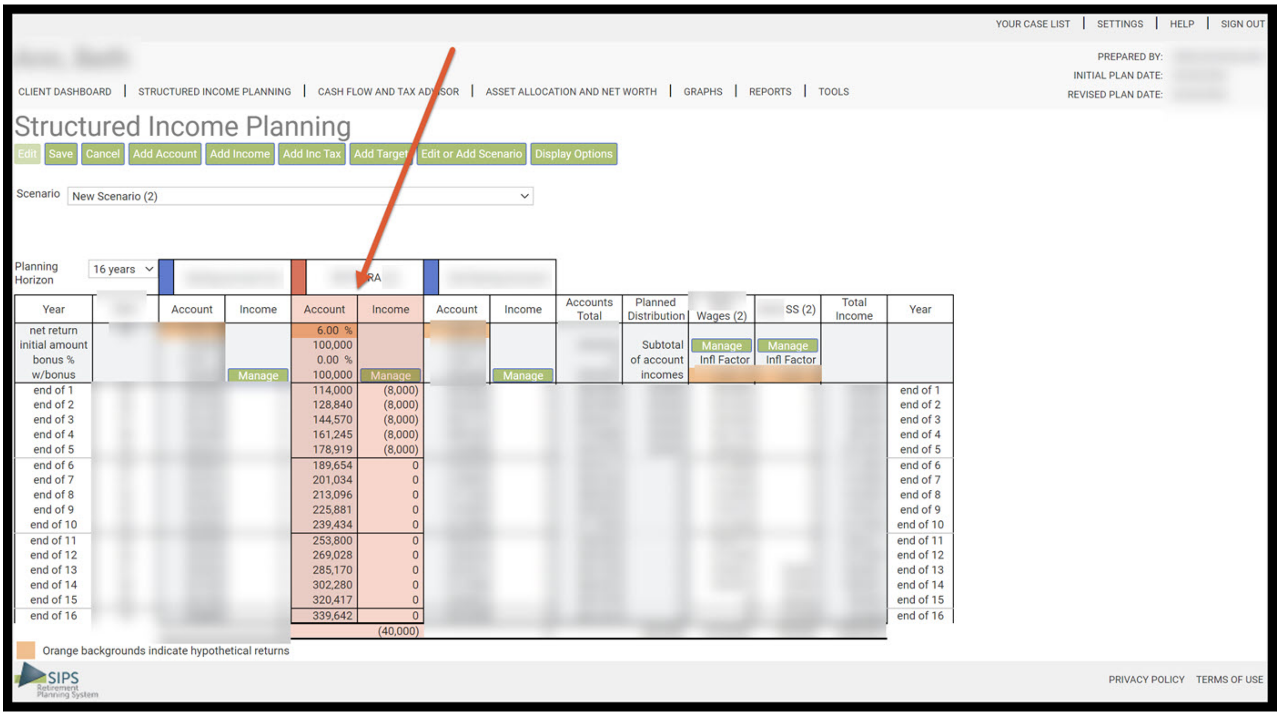
Step 7: Clicking: The monetary amount should move into the variable section of the Income Data table and the Income title Fixed should be correlated into the income data.



Step 8: Save: Once done click on the green Save button underneath the Manage Account subheading.

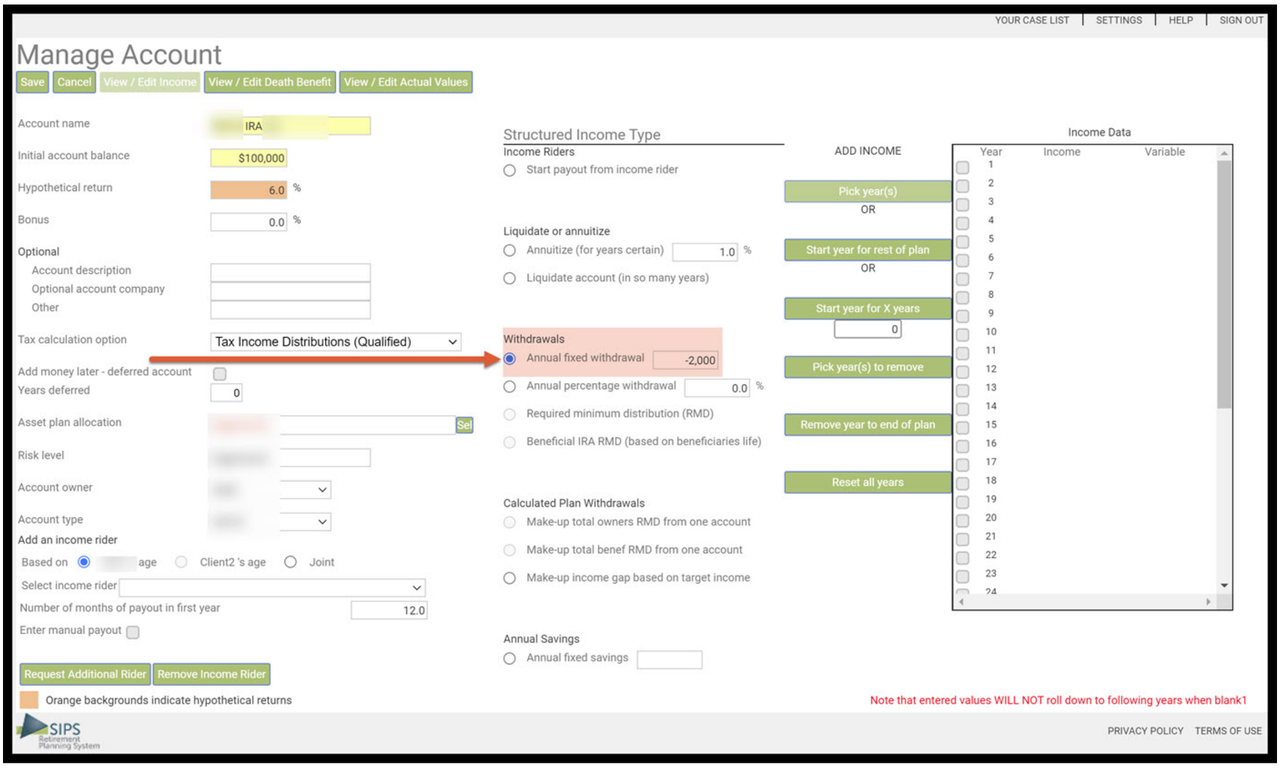


Step 9: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

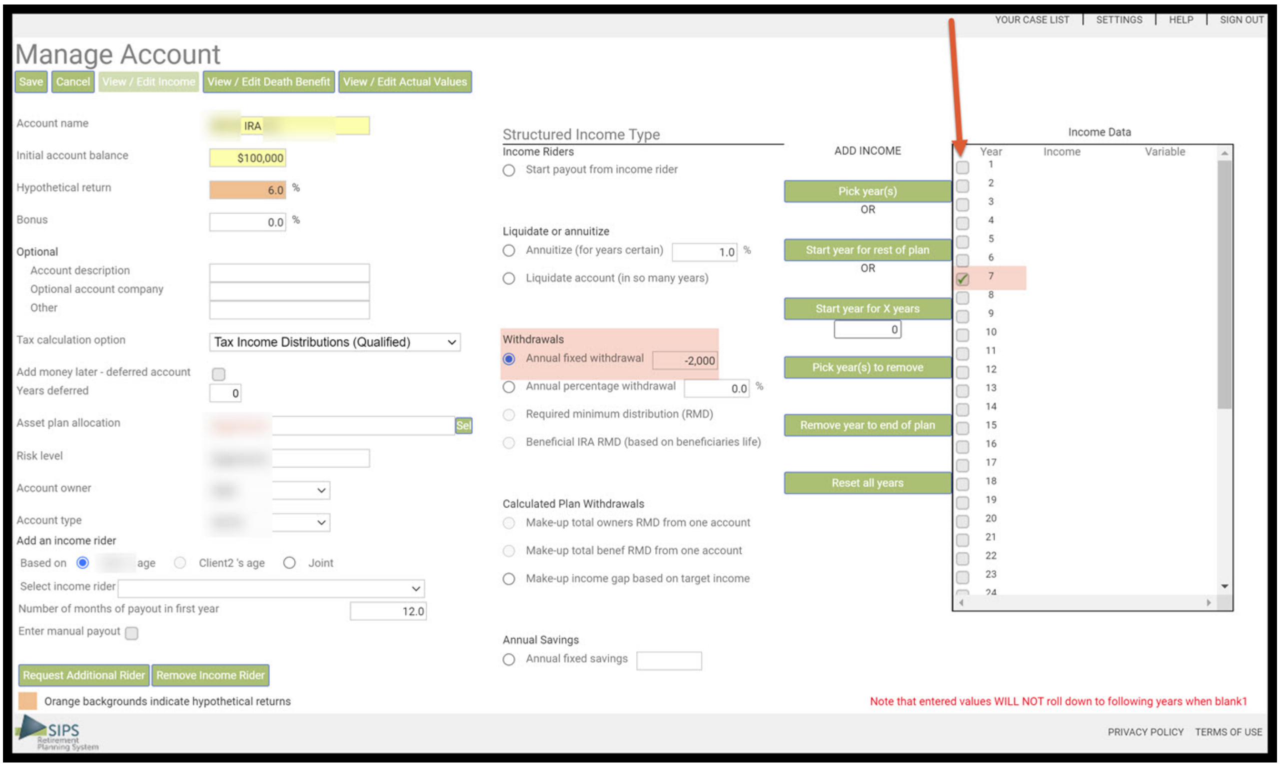


Option B: Start Years for the Rest of the Plan:

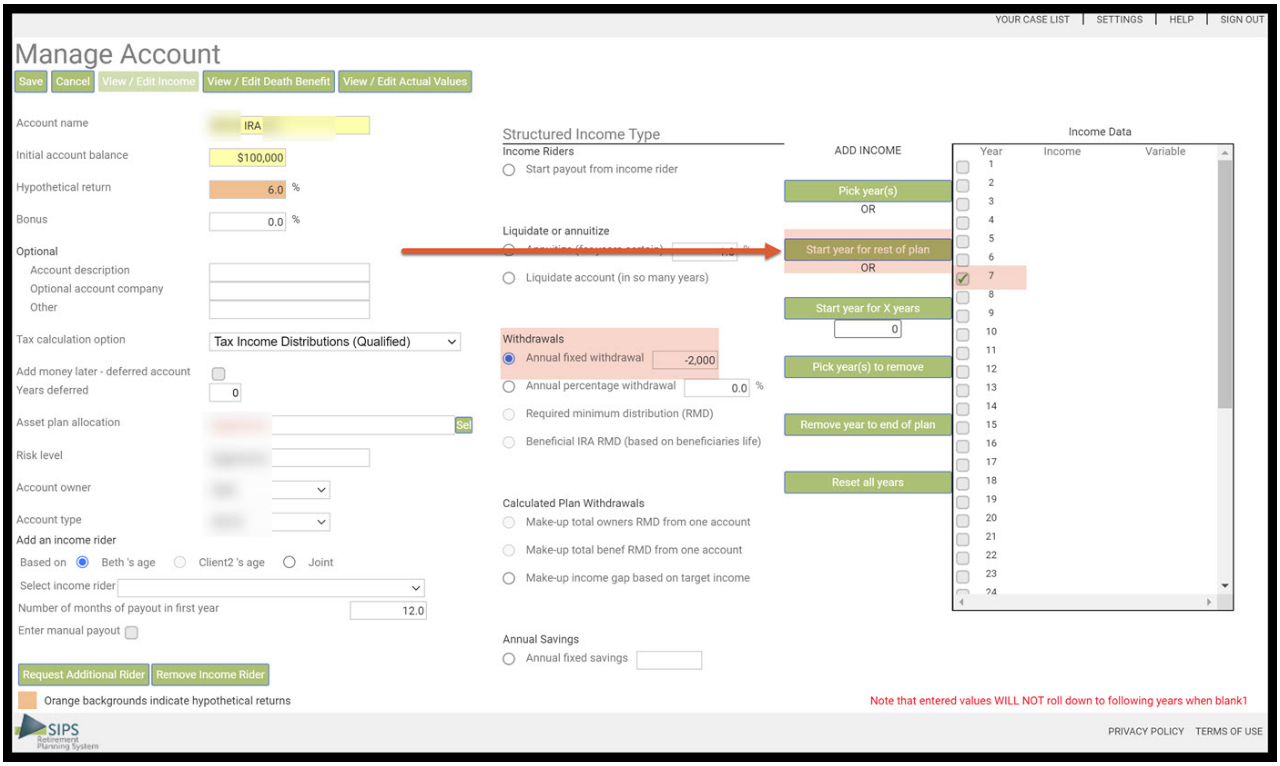
Step 10: Adding a Monetary Addition: To add money into an account, the numerical amount has to start with a negative symbol (-). The numerical number can be typed in with or without a comma, SIPS recognizes both styles of numbers. Type in the monetary amount.



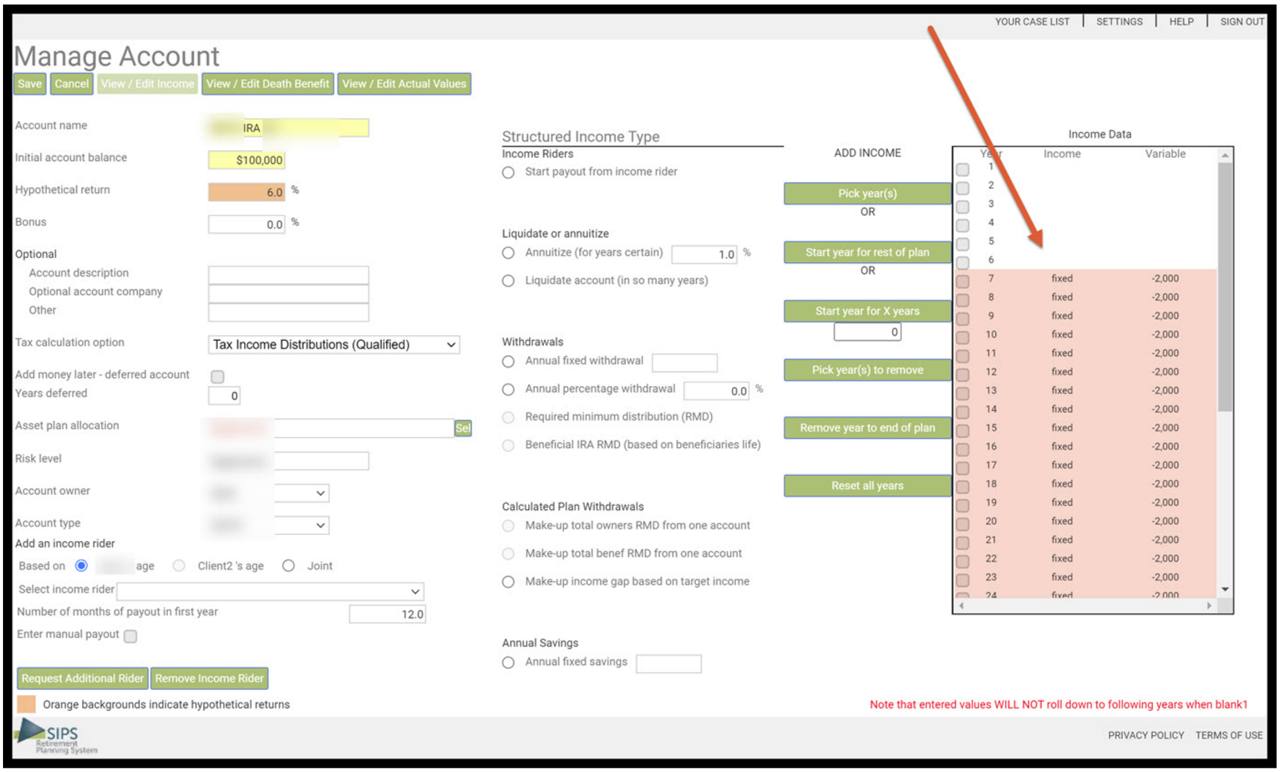
Step 11: Year: In the Income data table select which year you would like to start the years for the rest of the plan.



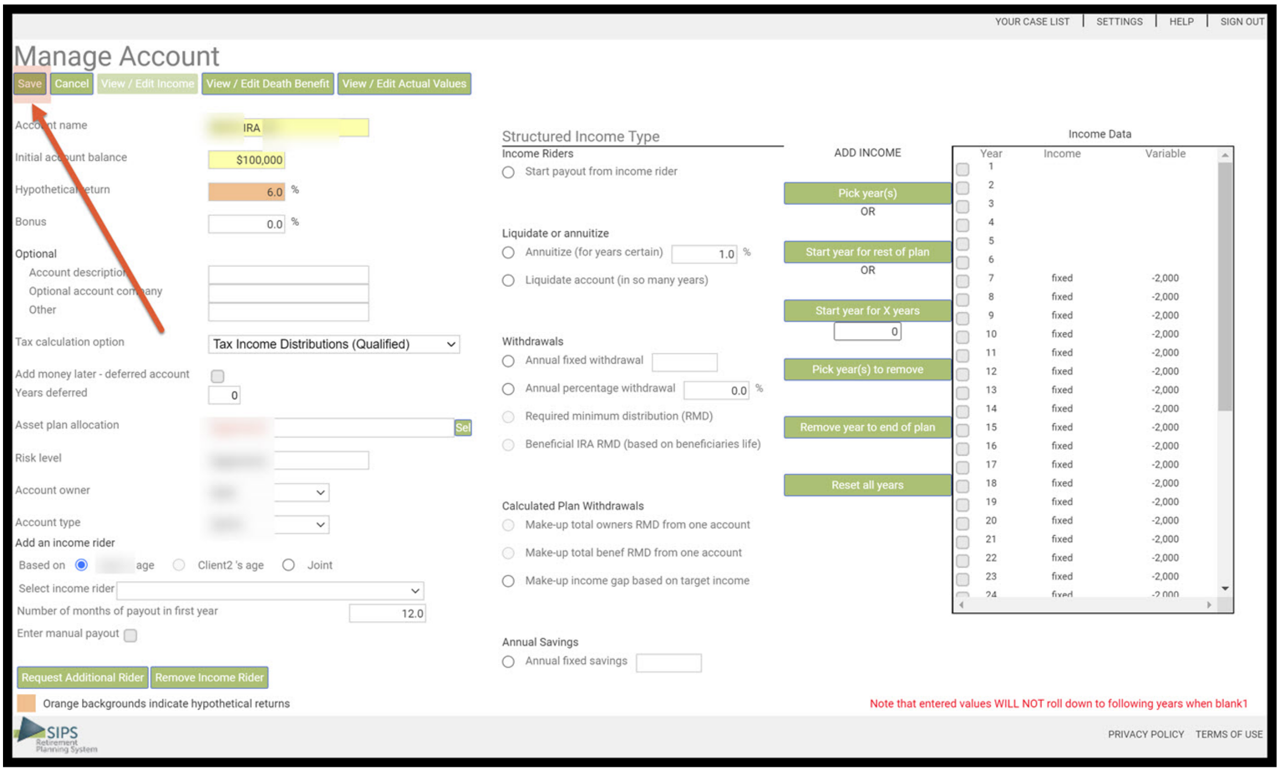
Step 12: Start Year for Rest of Plan: Click on the green button Start Year for Rest of Plan.



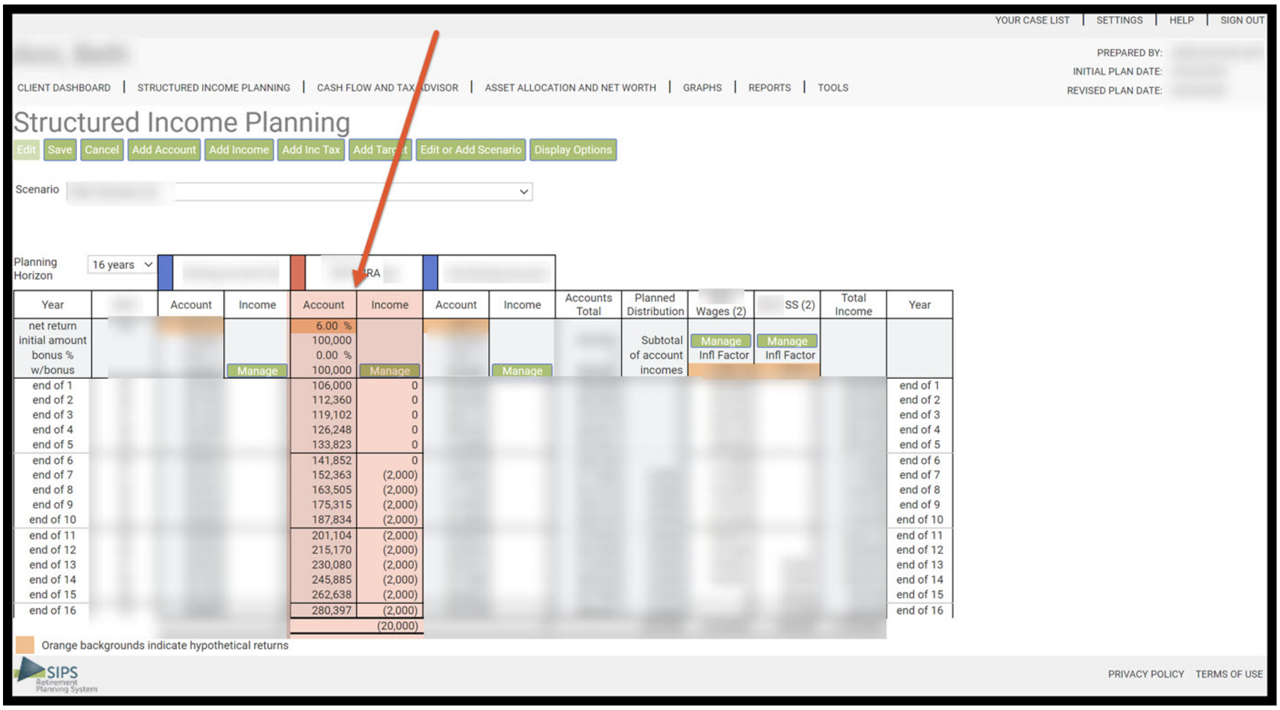
Step 13: Clicking: The monetary amount should move into the Variable column and the title Fixed should be entered into the Income column of the Income Data table.



Step 14: Save: Once done click on the green Save button underneath the Manage Account subheading.

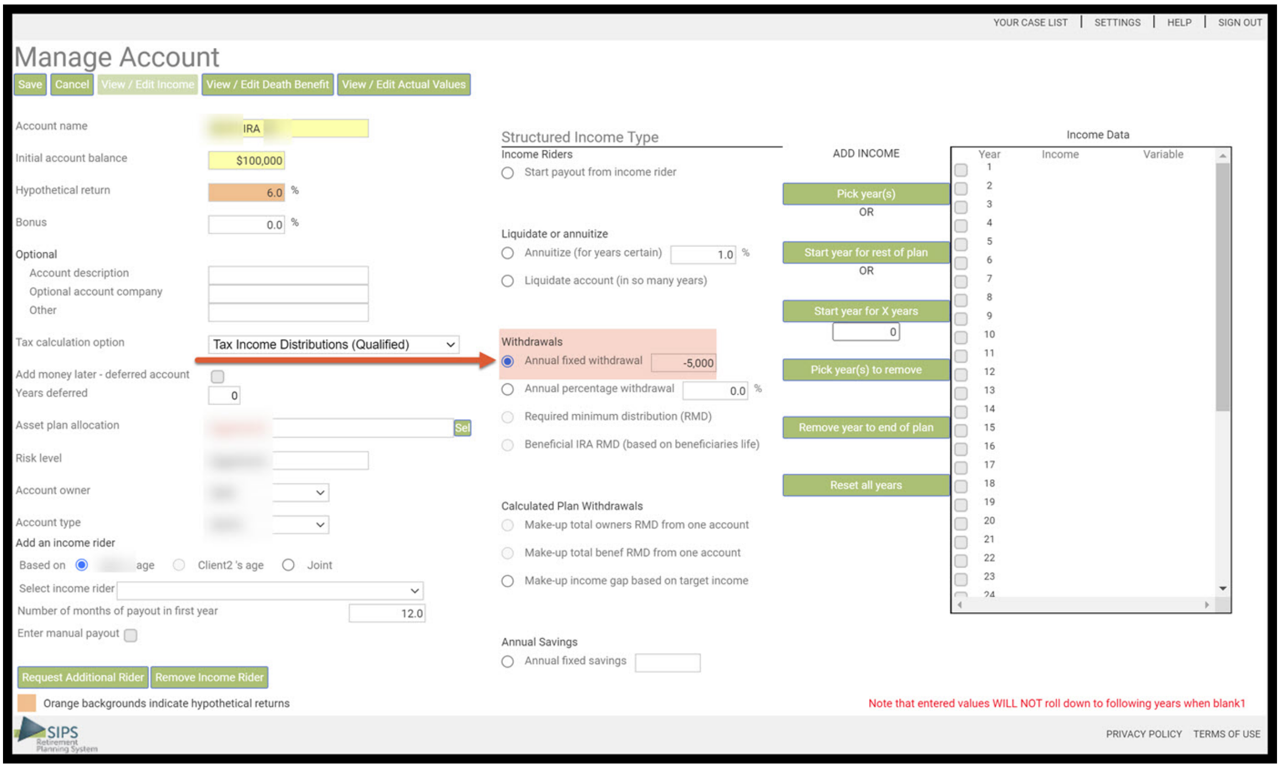


Step 15: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

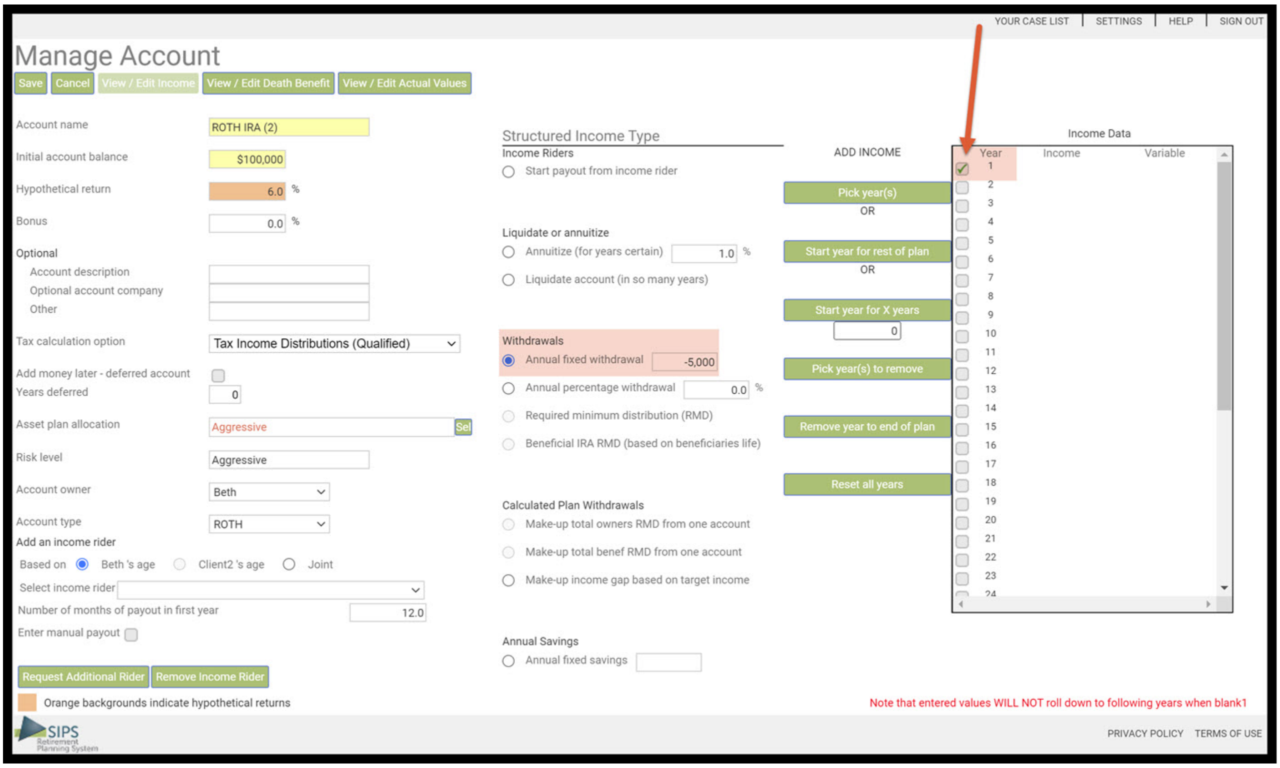


Option C: Start Years for X Years:

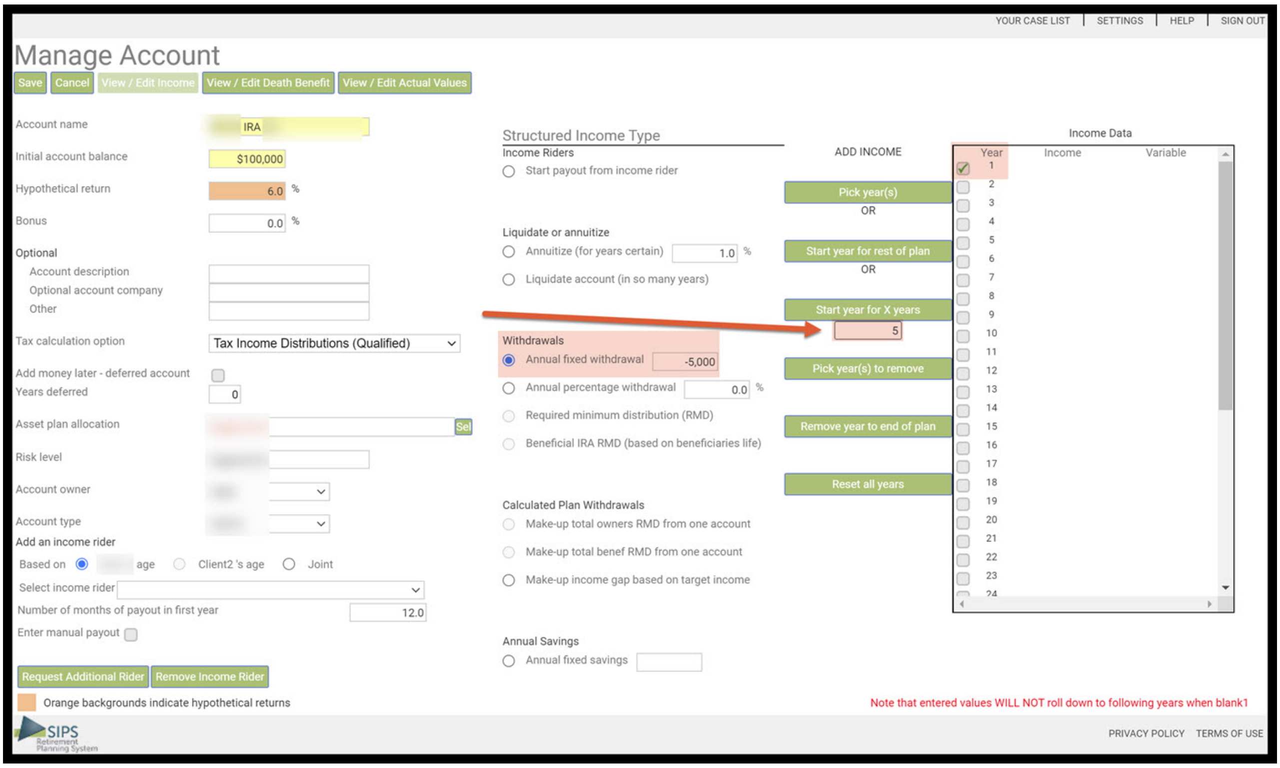
Step 16: Adding a Monetary Addition: To add money into an account, the numerical amount has to start with a negative symbol (-). The numerical number can be typed in with or without a comma, SIPS recognizes both styles of numbers. Type in the monetary amount.



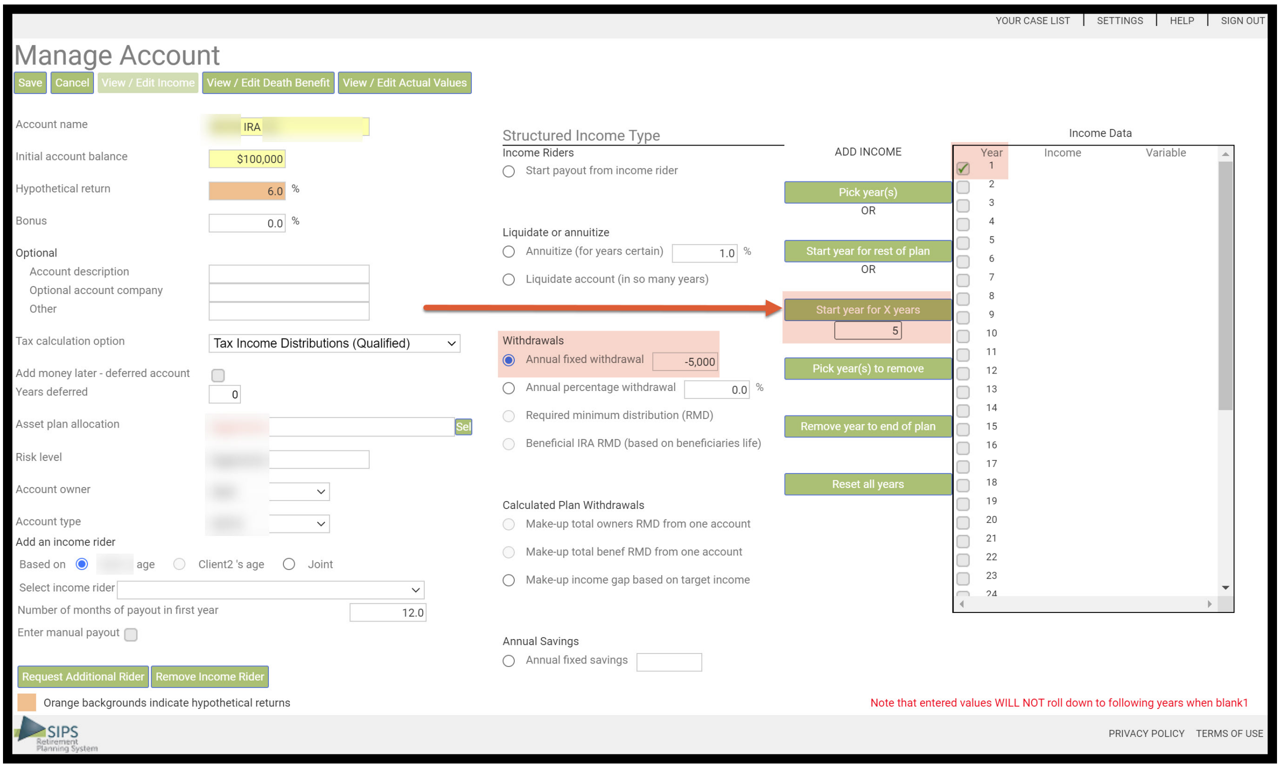
Step 17: Year: In the Income data table select which year you would like to start the monetary addition.



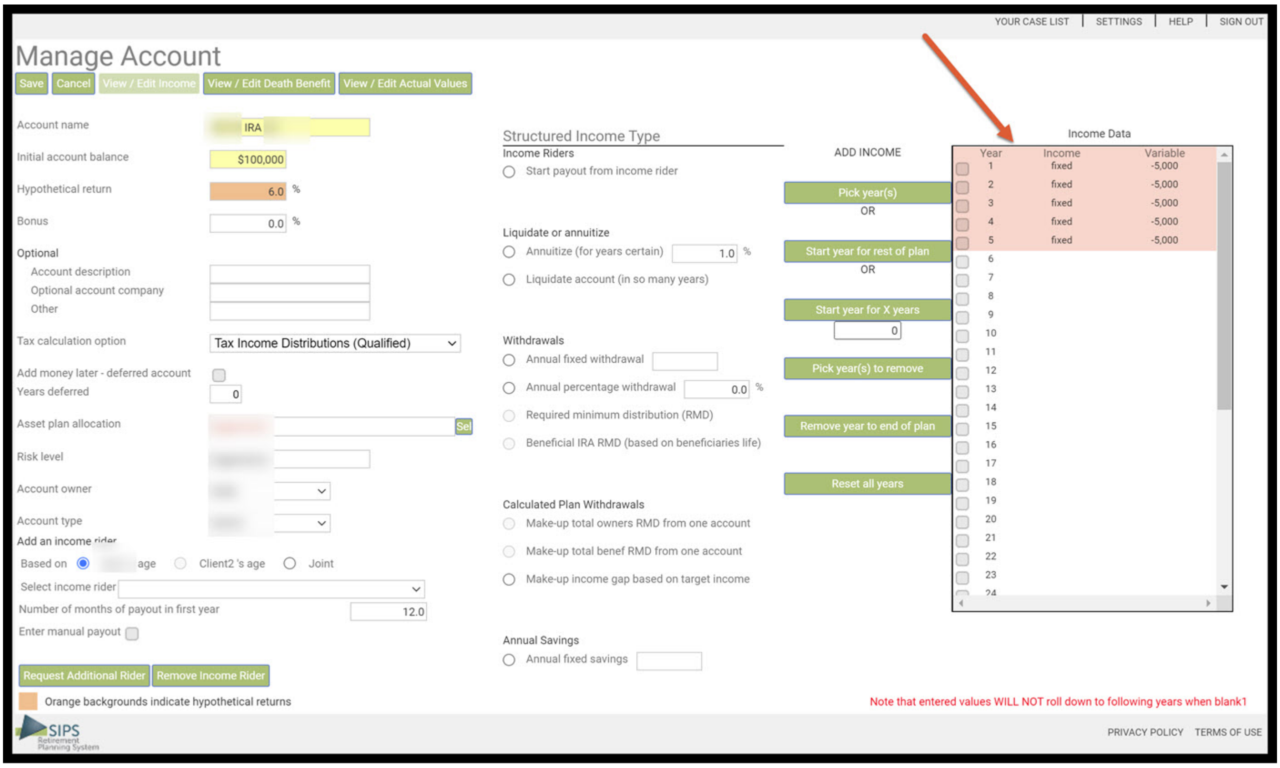
Step 18: Start Year for X Years Text Box: Within the text box for Start Year fox X Years, type in the how many years you would like the monetary amount to be distributed.



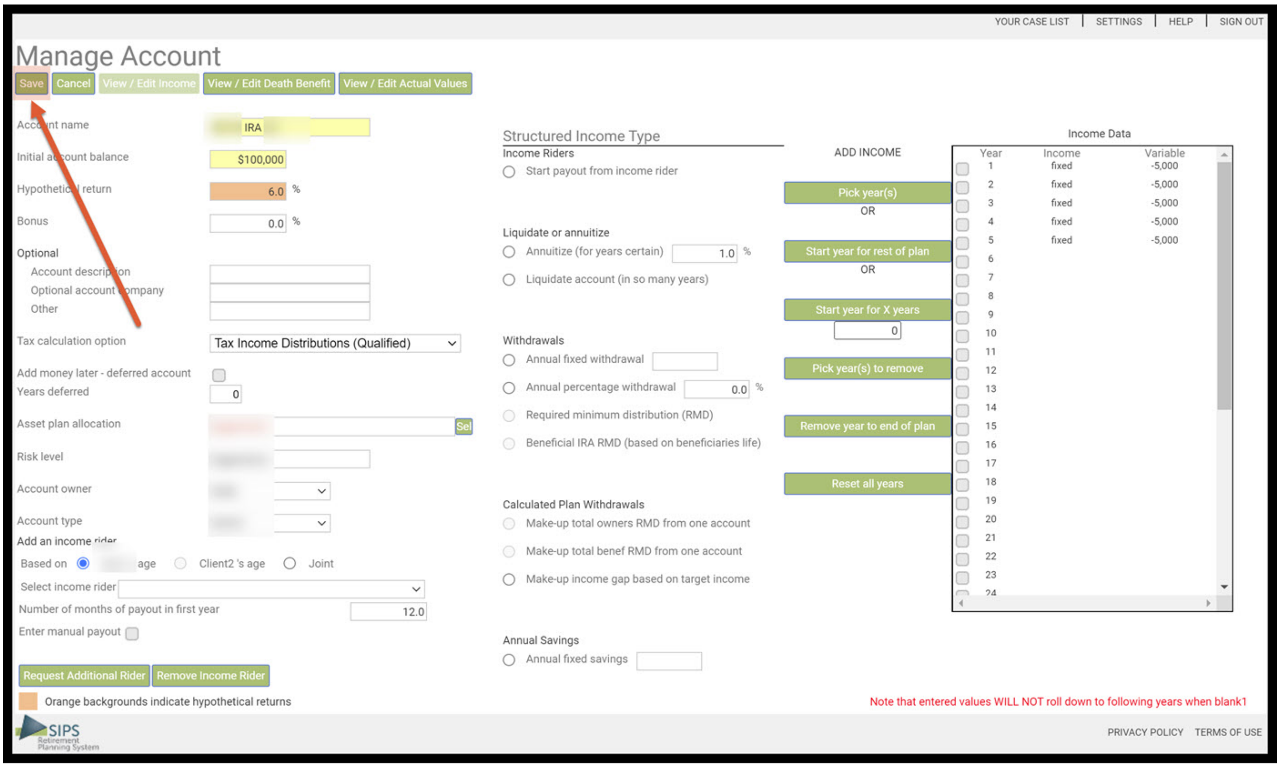
Step 19: Start Years for X Years: Click on the green button Start Years for X Years.



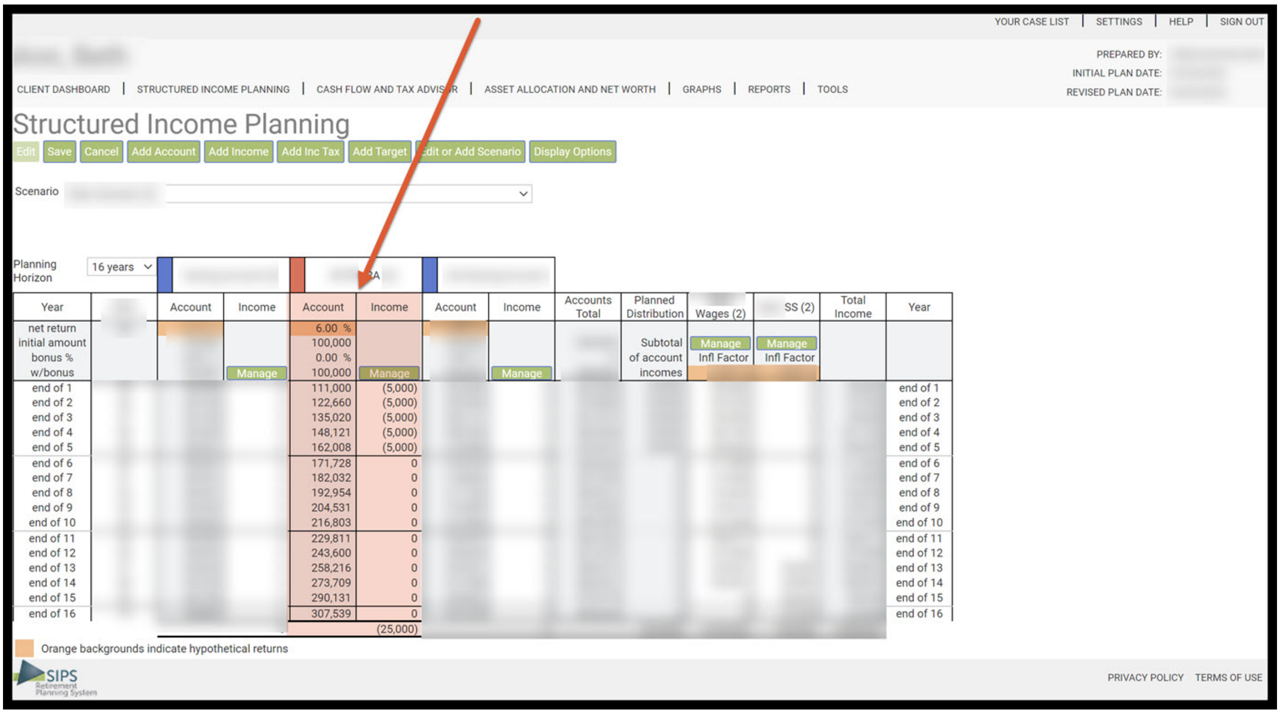
Step 20: Clicking: The monetary amount should move into the variable section of the Income Data table and the term Fixed should move into the Income column of the Income Data table.



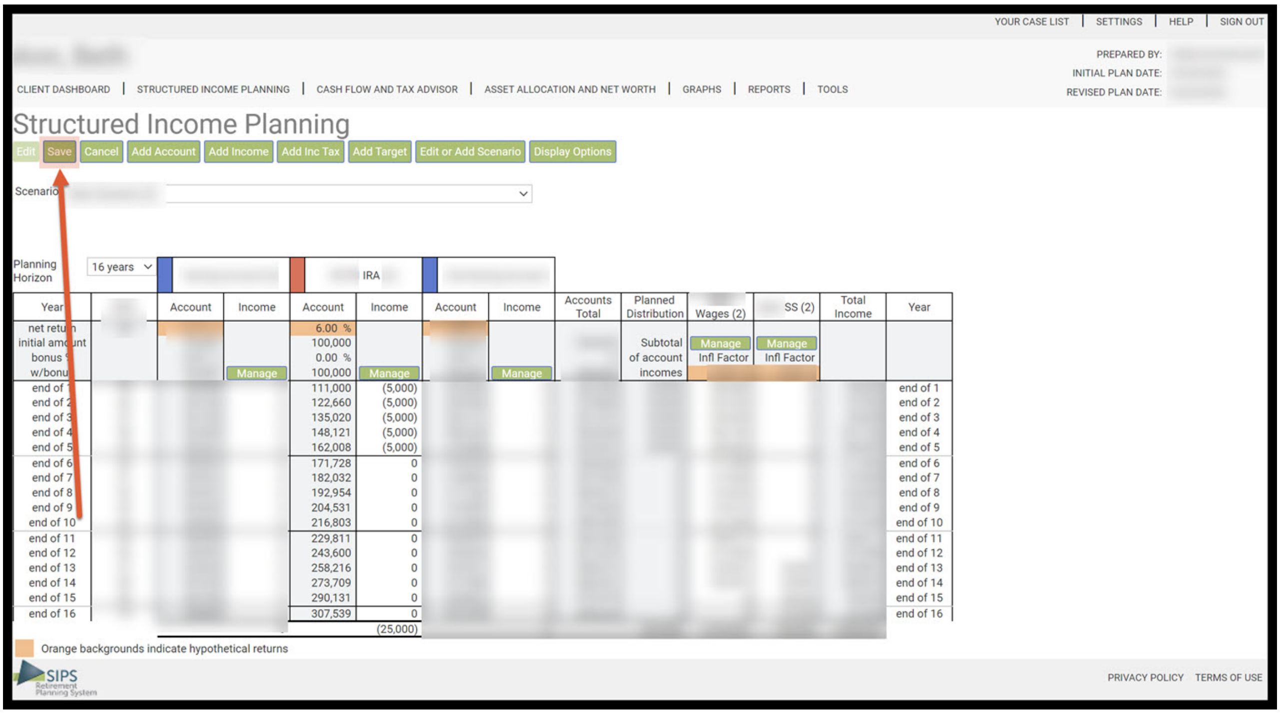
Step 21: Save: Once done click on the green Save button underneath the Manage Account subheading.



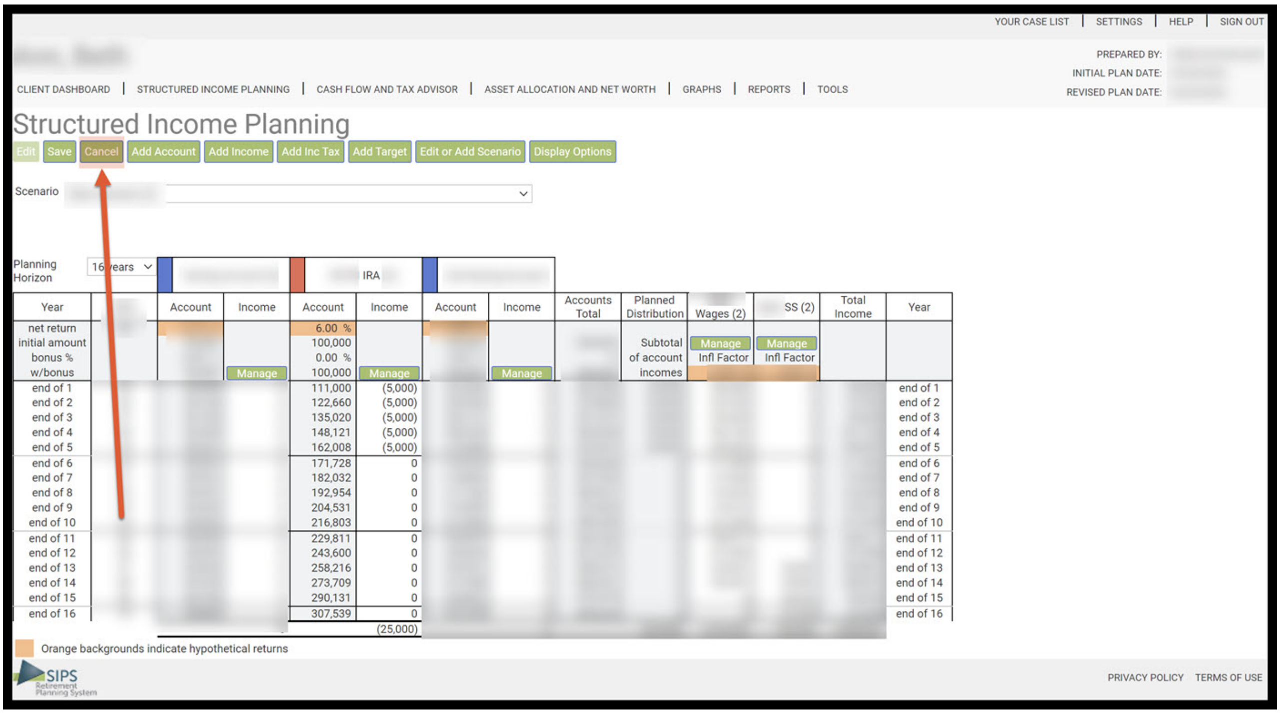
Step 22: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.



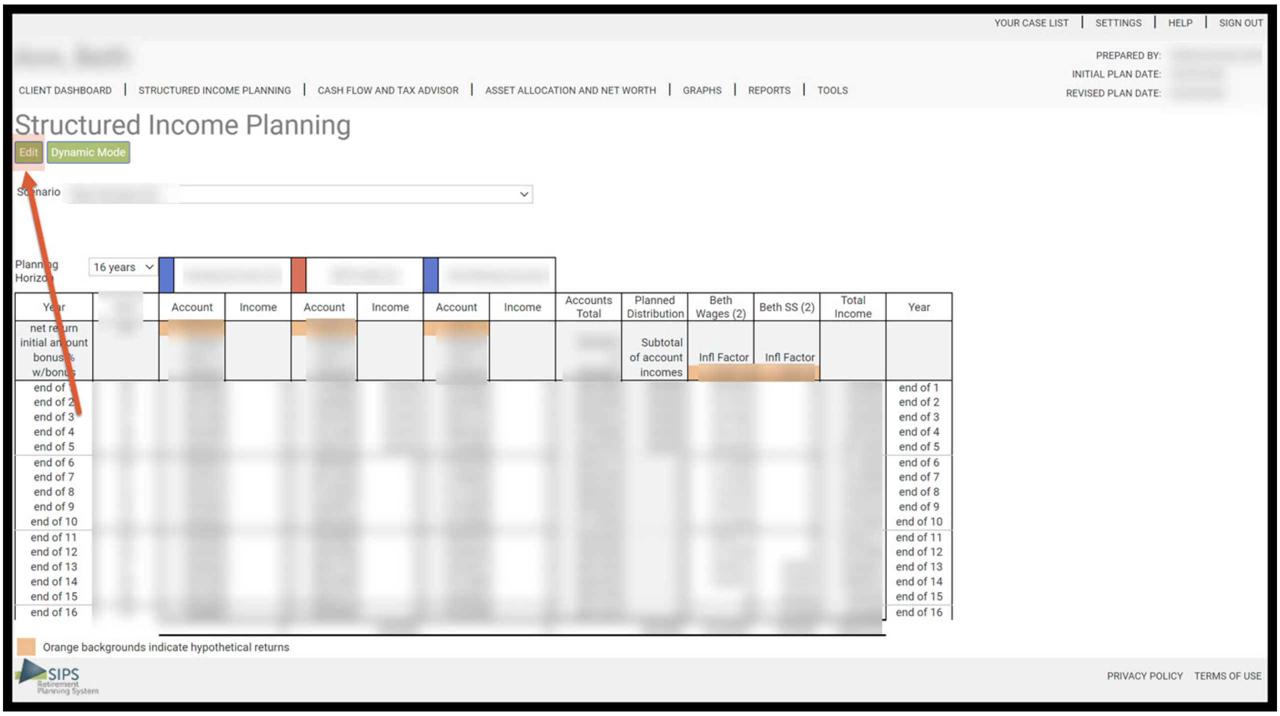
Step 23: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



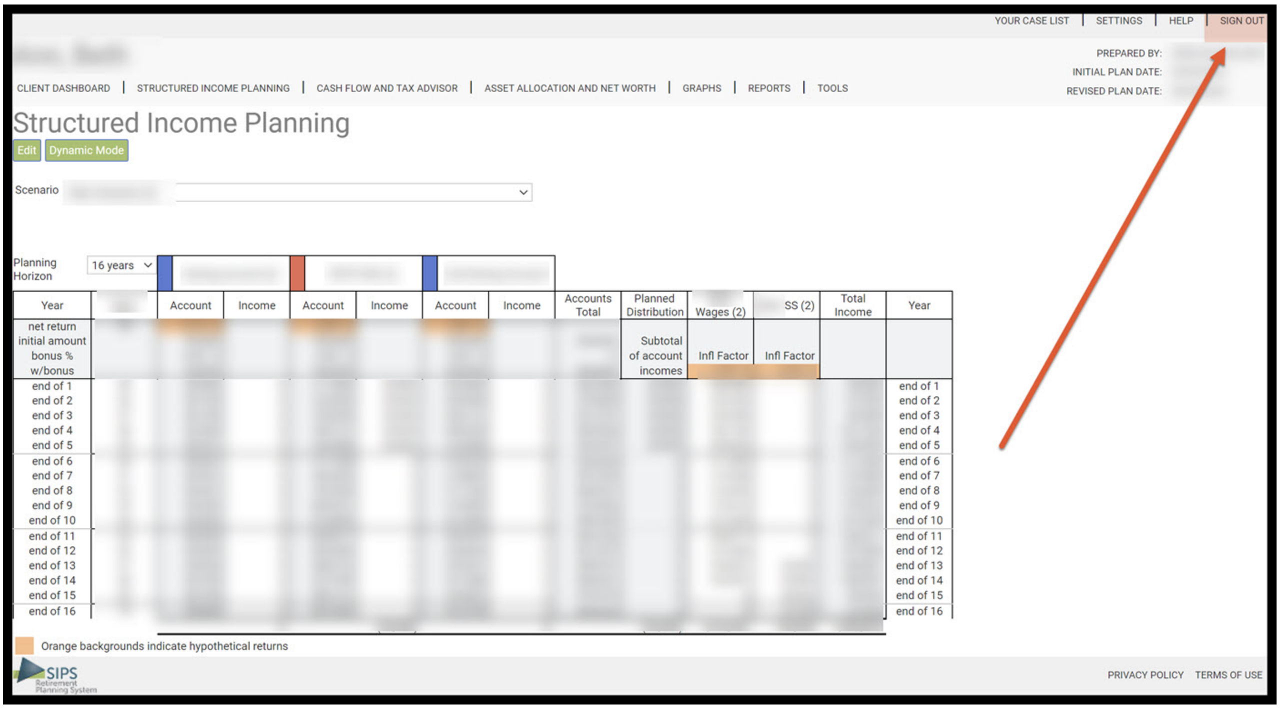
Step 24: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 25: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



Step 26: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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.