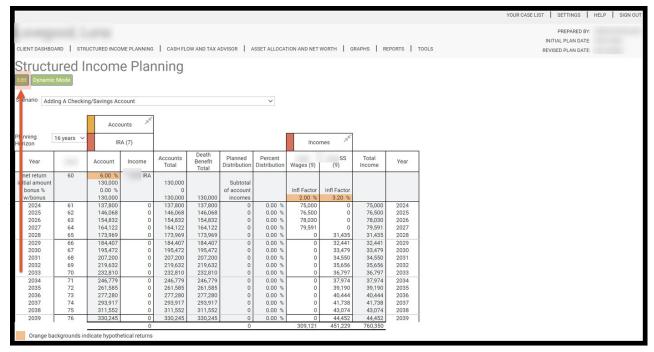
Creating a Checking/Savings Account from the Structured Income Planning Page

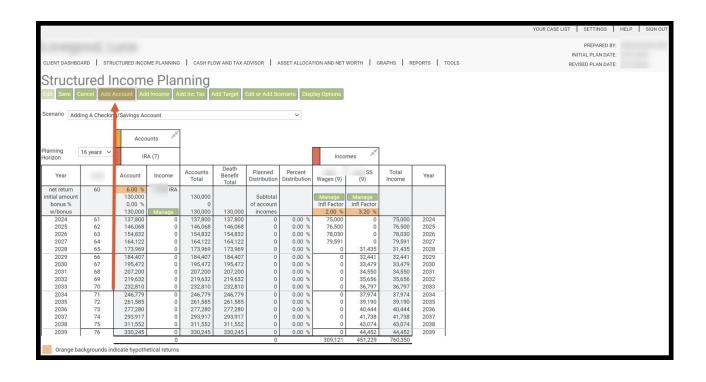
10/27/2024 4:45 pm EDT

From the Structured Income Planning page, you have the capacity to add many different forms of accounts to the structured income plan. Below is a step-by-step guide for creating a checking/savings account from the structured income planning page.

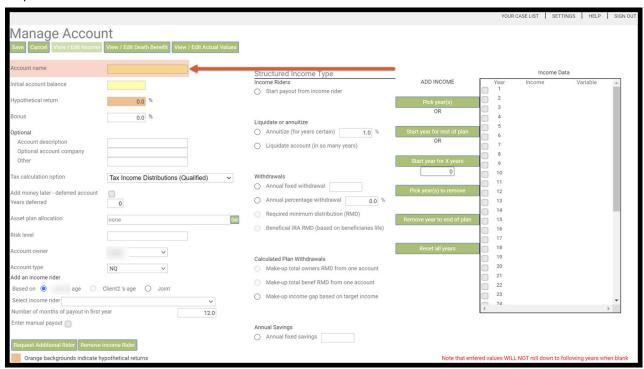
Step 1: Edit: Click on the green edit button underneath the Structured Income Planning subheading.



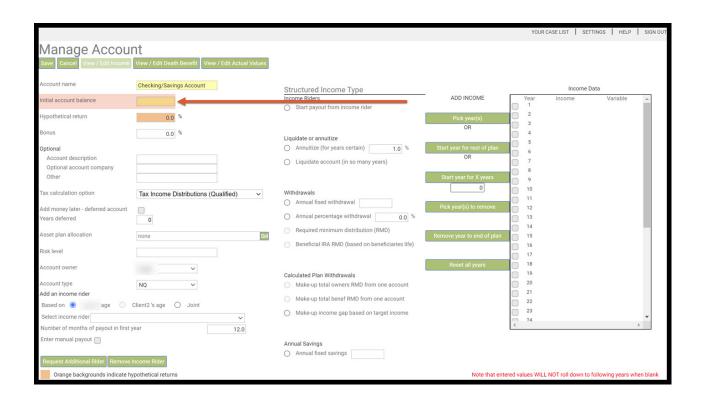
Step 2: Add Account: Click on the green add account underneath the Structured Income Planning subheading.



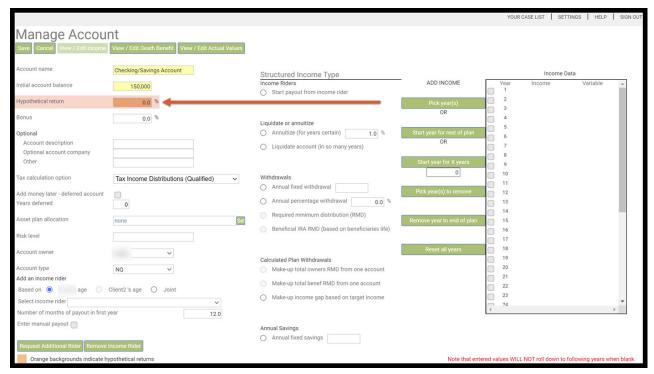
Step 3: Account Name: Filter in the account name.



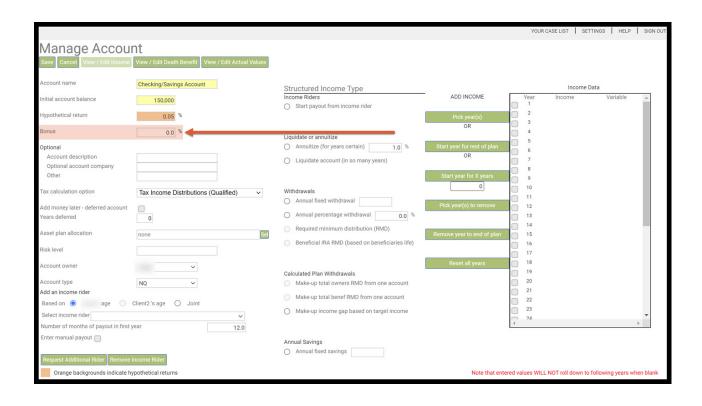
Step 4: Initial Account Balance: Filter in the monetary amount into the Initial account balance text box. SIPS only recognizes whole numbers. Putting a comma in is optional, SIPS recognizes both formats.



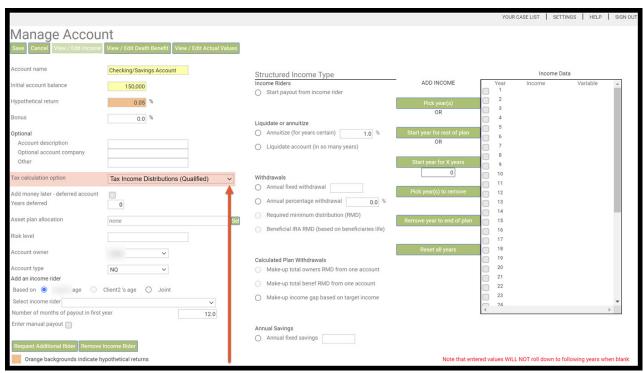
Step 5: Hypothetical Return: Enter in the numeric hypothetical return. If there is not hypothetical return this box can be left at the default amount of zero.



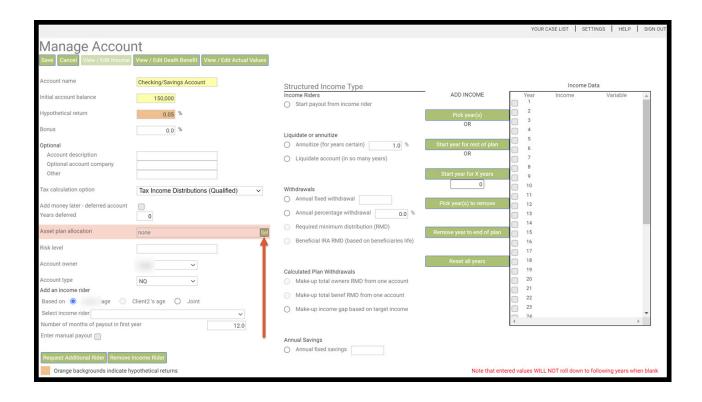
Step 6: Bonus: If the account has a bonus percentage on it, enter the numeric amount in the text box next to Bonus. If there is no bonus this text box can be left blank.



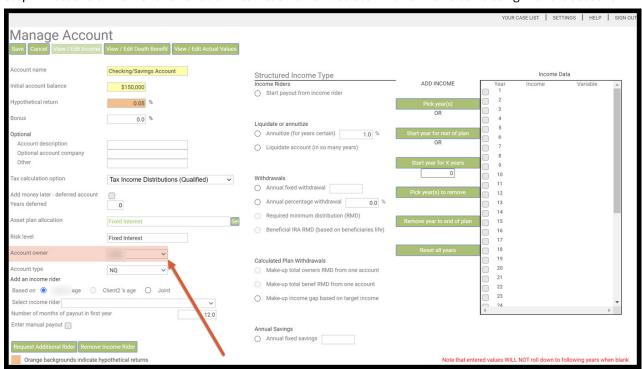
Step 7: Tax Calculation Option: Click on the down carrot arrow in the text box. Select which tax option the account correlates with the account.



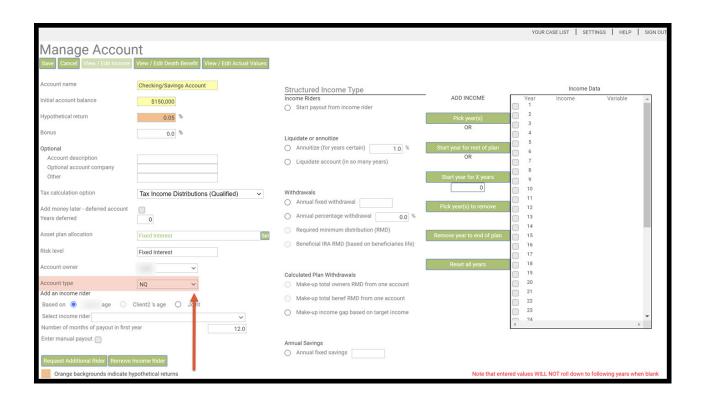
Step 8: Asset Plan Allocation: Click on the green Sel button and select which asset location the account correlates with. Once you pick the asset location the text box underneath in the risk level will automatically change to correlate to the asset plan allocation.



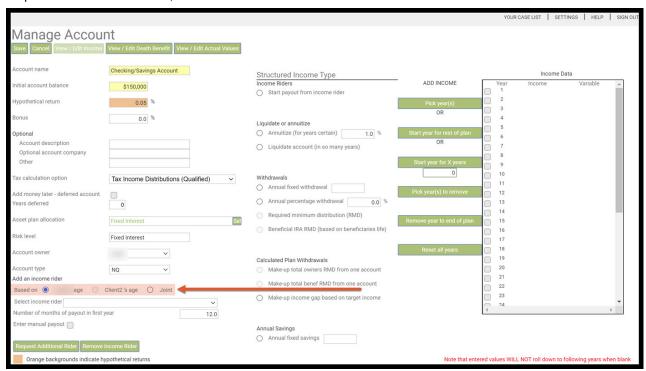
Step 9: Account Owner: Click on the down carrot arrow and select which owner is correlating with the account.



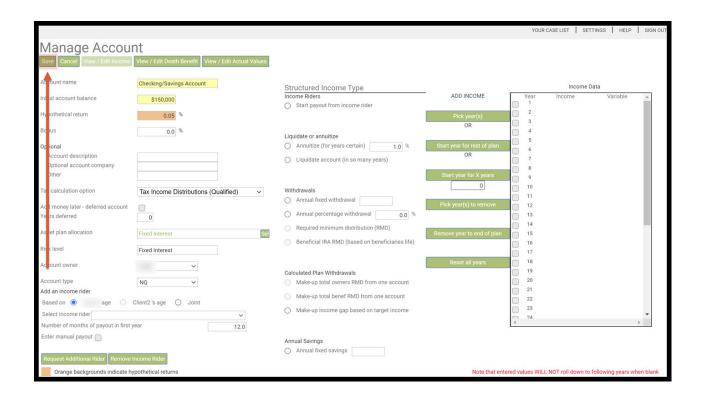
Step 10: Account Type: Click on the dropdown carrot arrow and select what type of account you are filtering in.



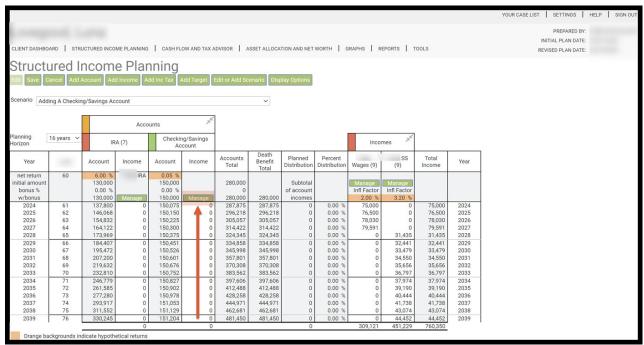
Step 11: Add an Income Rider, Based On: Click on which radio button this account correlates with.



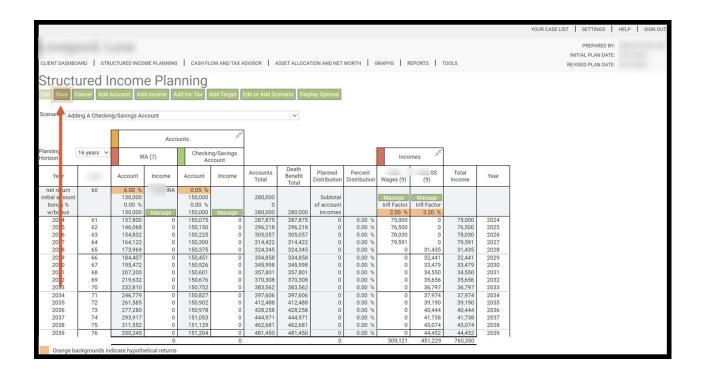
Step 12: Save: Click on the green Save button underneath the Manage Account Subheading.



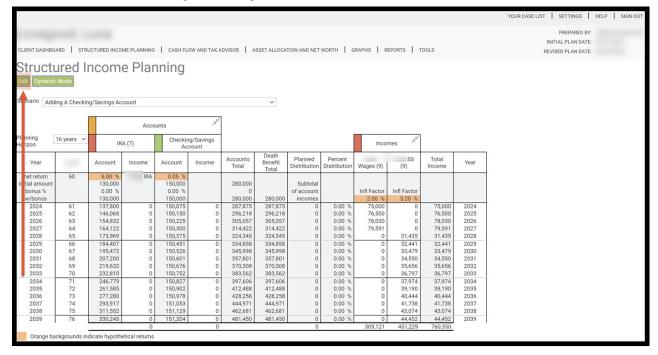
Step 13: Manage: To make any editing changes to the account, click on the green manage button located in the income column of the account. This will take you back to the manage account page.



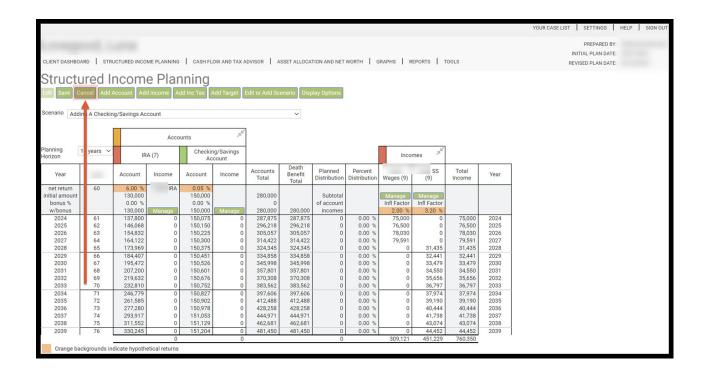
Step 14: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



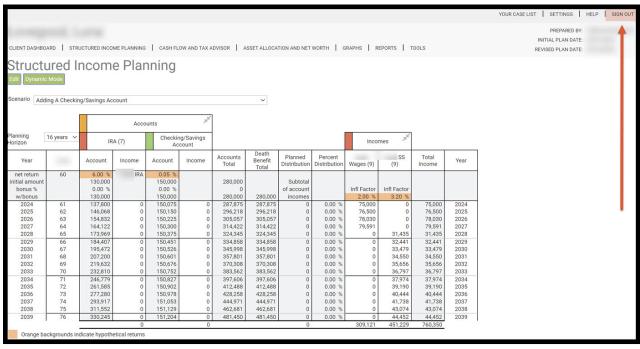
Step 15: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 16: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 17: 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: +1-888-449-6917 or support@planscout.com