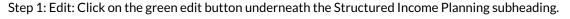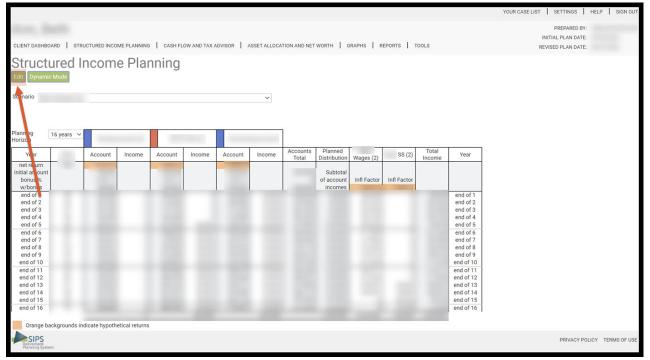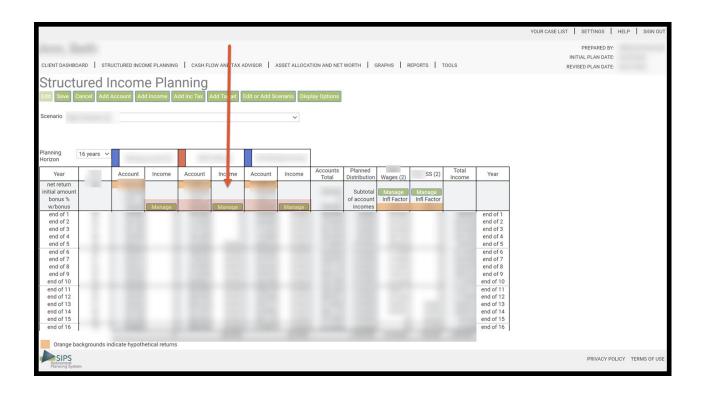# Income Data Table within the Manage Account Page

11/04/2024 1:33 pm EST

To change any information about the accounts is done through the Manage Account page. To change any information about the income to the accounts it is done through selecting a structured income type and the income data table. Below are instructional steps about each of the Income Data functions.

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

Step 2: Manage: Click on the green Manage button that is located in the incomes column for whichever account you would like to add or withdrawal a monetary amount to.

Step 3: Structured Income Type: Within in this column select which function you would like to do to the account.

Step 4: Text box: Depending on which radio button you have selected, if it has a text box, enter the monetary or percentage amount into the text box.

NOTE: SIPS does not recognize the dollar mark ($).

NOTE: IF you are depositing monetary amounts into the account, the whole number needs to start with a negative symbol (-).

NOTE: IF you are withdrawing a monetary amount the whole number does not need to start with a mathematical equation.

NOTE: If you are adding a percentage amount, the numerical amount can be entered as a whole number.

Option A: Pick Years:

Step 5: Structured Income Type: Pick the Structured Income Type you are using.

Step 6: Income Data: Within the Income data table click on the Year text box that you would like to select.

Step 7: Pick Years: Click on the green Pick Years button located at the lefthand side of the Income Data table.

Step 8: Clicking: After clicking on the Pick Years green button, the data should be entered into the Income Data

table.

Step 9: Save: Click on the green button Save underneath the Manage Account subheading.

Step 10: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made to the account.

Option B: Start Years for Rest of Plan:

Step 11: Structured Income Type: Pick the Structured Income Type you are using.

Step 12: Income Data: Within the Income data table click on the Year text box that you would like to start the years.

Step 13: Start Years for Rest of Plan: Click on the green button Start Years for Rest of Plan.

Step 14: Clicking: After clicking on the Start Years for Rest of Plan button the data for the income and variable data should be entered into the Income Data table.

Step 15: Save: Click on the green button Save underneath the Manage Account subheading.

Step 16: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made to the account.

Structured Income Planning

Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario

Planning Horizon	16 years ˅					Account						
Year	Beth	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Total Income	Year
net return	54					2.00 %							
initial amount						100,000			Subtotal of account incomes	Manage Infl Factor	Manage Infl Factor		
bonus %						0.00 %							
w/bonus			Manage		Manage	100,000	Manage						
end of 1						102,000	0						end of 1
end of 2						104,040	0						end of 2
end of 3						106,121	0						end of 3
end of 4						108,243	0						end of 4
end of 5						112,408	(2,000)						end of 5
end of 6						116,656	(2,000)						end of 6
end of 7						120,989	(2,000)						end of 7
end of 8						125,409	(2,000)						end of 8
end of 9						129,917	(2,000)						end of 9
end of 10						134,516	(2,000)						end of 10
end of 11						139,206	(2,000)						end of 11
end of 12						143,990	(2,000)						end of 12
end of 13						148,870	(2,000)						end of 13
end of 14						153,847	(2,000)						end of 14
end of 15						158,924	(2,000)						end of 15
end of 16						164,103	(2,000)						end of 16
							(24,000)						

Orange backgrounds indicate hypothetical returns

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Option C: Start Year for X Years:

Step 17: Structured Income Type: Pick the Structured Income Type you are using.

Manage Account

Save | Cancel | View / Edit Income | View / Edit Death Benefit | View / Edit Actual Values

Account name	Account	
Initial account balance	$100,000	
Hypothetical return	2.0 %	
Bonus	0.0 %	
Optional		
Account description		
Optional account company		
Other		
Tax calculation option	Tax Income Distributions (Qualified) ˅	
Add money later - deferred account	☐	
Years deferred	0	
Asset plan allocation		Sel
Risk level		
Account owner	˅	
Account type	˅	

Add an income rider

Based on ⦿ [   ] age   ◯ Client2 's age   ◯ Joint

Select income rider [˅]

Number of months of payout in first year   12.0

Enter manual payout ☐

Request Additional Rider | Remove Income Rider

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders
◯ Start payout from income rider

Liquidate or annuitize
◯ Annuitize (for years certain)   1.0 %
◯ Liquidate account (in so many years)

Withdrawals
◯ Annual fixed withdrawal [   ]
◯ Annual percentage withdrawal   0.0 %
◯ Required minimum distribution (RMD)
◯ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals
◯ Make-up total owners RMD from one account
◯ Make-up total benef RMD from one account
◯ Make-up income gap based on target income

Annual Savings
◯ Annual fixed savings [   ]

ADD INCOME

Pick year(s)
OR
Start year for rest of plan
OR
Start year for X years
[0   ]
Pick year(s) to remove
Remove year to end of plan
Reset all years

Income Data

	Year	Income	Variable
☐	1		
☐	2		
☐	3		
☐	4		
☐	5		
☐	6		
☐	7		
☐	8		
☐	9		
☐	10		
☐	11		
☐	12		
☐	13		
☐	14		
☐	15		
☐	16		
☐	17		
☐	18		
☐	19		
☐	20		
☐	21		
☐	22		
☐	23		
☐	24		

Note that entered values WILL NOT roll down to following years when blank1

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Step 18: Income Data: Within the Income data table click on the Year text box that you would like to select.

Step 19: Start Year for X Years text box: Within the text box for Start Year fox X Years, type in the whole number that you would like to use. Click on the green button Start Years for X years.
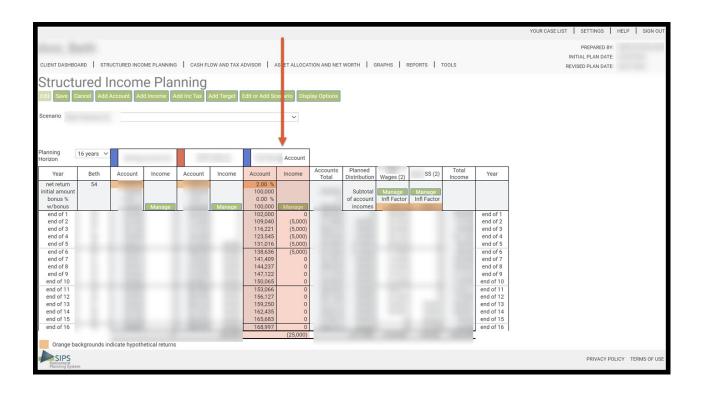

Step 20: Clicking: After clicking on the Start Year for X Years button the data should be filtered into the Income Data table.

Step 21: Save: Click on the green button Save underneath the Manage Account subheading.

Step 21: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made to the account.

Option D: Pick year(s) to remove:

Step 22: Income Data: Within the Income data table click on the Year text box that you would like to select.

Step 22: Pick year(s) to remove: Click on the green button Pick year(s) to remove on the lefthand side of the Income Data table.

Step 23: Clicking: Once clicking on the Pick year(s) to remove button the years should be removed from the Income Data table.

Step 24: Save: Click on the green button Save underneath the Manage Account subheading.

Manage Account

Save | Cancel | View / Edit Income | View / Edit Death Benefit | View / Edit Actual Values

		Structured Income Type		ADD INCOME		Income Data		
Account name	Account	Income Riders			Year	Income	Variable	
Initial account balance	$100,000	○ Start payout from income rider		Pick year(s)	1			
Hypothetical return	2.0 %			OR	2			
Bonus	0.0 %	Liquidate or annuitize			3			
Optional		○ Annuitize (for years certain) 1.0 %		Start year for rest of plan	4			
Account description		○ Liquidate account (in so many years)		OR	5	fixed	-3,000	
Optional account company					6	fixed	-3,000	
Other				Start year for X years	7	fixed	-3,000	
Tax calculation option	Tax Income Distributions (Qualified) ▼	Withdrawals		0	8	fixed	-3,000	
		○ Annual fixed withdrawal			9	fixed	-3,000	
Add money later - deferred account	☐	○ Annual percentage withdrawal 0.0 %		Pick year(s) to remove	10	fixed	-3,000	
Years deferred	0	○ Required minimum distribution (RMD)			11	fixed	-3,000	
Asset plan allocation	Sel	○ Beneficial IRA RMD (based on beneficiaries life)		Remove year to end of plan	12	fixed	-3,000	
Risk level					13	fixed	-3,000	
Account owner	▼				14	fixed	-3,000	
Account type	▼	Calculated Plan Withdrawals		Reset all years	15	fixed	-3,000	
Add an income rider		○ Make-up total owners RMD from one account			16	fixed	-3,000	
Based on ● age ○ Client2's age ○ Joint		○ Make-up total benef RMD from one account			17	fixed	-3,000	
Select income rider	▼	○ Make-up income gap based on target income			18	fixed	-3,000	
Number of months of payout in first year	12.0				19	fixed	-3,000	
Enter manual payout ☐					20	fixed	-3,000	
		Annual Savings			21	fixed	-3,000	
Request Additional Rider	Remove Income Rider	○ Annual fixed savings			22	fixed	-3,000	
					23	fixed	-3,000	
☐ Orange backgrounds indicate hypothetical returns					24	fixed	-3,000	

Note that entered values WILL NOT roll down to following years when blank1

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Step 25: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made to the account.

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

Structured Income Planning

Edit | Save | Cancel | Add Account | Add Income | Add Inc Tax | Add Target | Edit or Add Scenario | Display Options

Scenario ▼

Planning Horizon	16 years ▼						Account							
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Total Income	Year	
net return						2.00 %			Subtotal	Manage	Manage			
initial amount						100,000			of account	Infl Factor	Infl Factor			
bonus %						0.00 %			incomes					
w/bonus			Manage		Manage	100,000	Manage							
end of 1						102,000	0						end of 1	
end of 2						104,040	0						end of 2	
end of 3						106,121	0						end of 3	
end of 4						108,243	0						end of 4	
end of 5						113,408	(3,000)						end of 5	
end of 6						118,676	(3,000)						end of 6	
end of 7						124,050	(3,000)						end of 7	
end of 8						129,531	(3,000)						end of 8	
end of 9						135,121	(3,000)						end of 9	
end of 10						140,824	(3,000)						end of 10	
end of 11						146,640	(3,000)						end of 11	
end of 12						152,573	(3,000)						end of 12	
end of 13						158,624	(3,000)						end of 13	
end of 14						164,797	(3,000)						end of 14	
end of 15						171,093	(3,000)						end of 15	
end of 16						177,515	(3,000)						end of 16	
							(36,000)							

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Option E: Remove year to end of plan:
Step 26: Income Data: Within the Income data table click on the Year text box that you would like to select.

Step 27: Remove year to end of plan: Click on the green button Remove year to end of plan located on the lefthand side of the Income Data table.
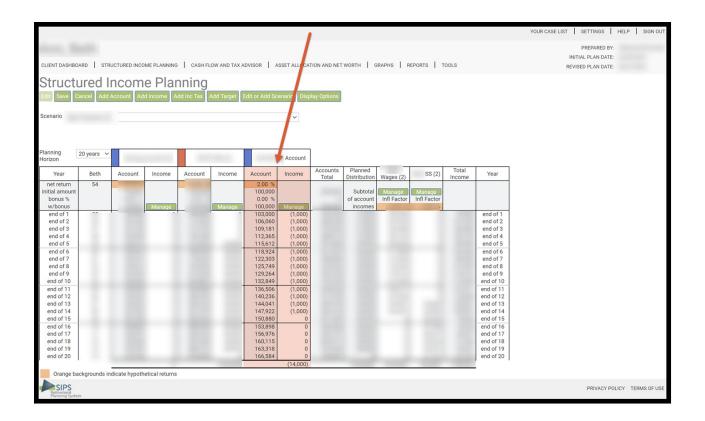

Step 28: Clicking: Once clicking on the Remove year to end of plan button the years should be removed from the Income Data table.

Step 29: Save: Click on the green button Save underneath the Manage Account subheading.

Step 30: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made to the account.

Option F: Reset all years:

NOTE: The Reset all years button is the function to remove all the data that is in the Income Data table. It will delete all information that was put into the Income Data table.

Step 31: Reset all years: Click on the green Reset all years button located on the lefthand side of the Income Data table.

Step 32: Save: Click on the green button Save underneath the Manage Account subheading.

Step 33: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page with the changes made to the account.

Step 34: 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