Annual Percentage Withdrawal Function

01/12/2026 10:36 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 percentage 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 add a monetary addition to.

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

Step 4: Adding the percentage amount: To add a monetary percentage the numeric amount has to start with a negative symbol (-). Type in the monetary percentage.

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 start with.

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

Step 7: Clicking: The percentage amount should move into the Variable column and the word percent should move into the Income column of the Income Data table.

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 the percentage amount: To add a monetary percentage the numeric amount has to start with a negative symbol (-). Type in the monetary percentage.

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 percentage amount should move into the Variable column and the word percent should move 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 the percentage amount: To add a monetary percentage the numeric amount has to start with a negative symbol (-). Type in the monetary percentage.

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 percentage amount should move into the Variable column and the word percent 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: 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 25: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

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.

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
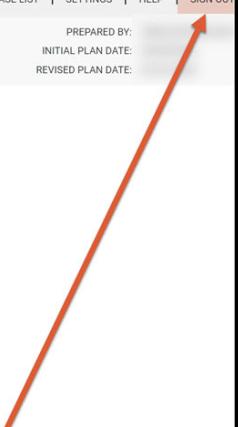
Scenario

Planning Horizon | 16 years

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						113,655	(3,247)						end of 5
end of 6						119,338	(3,410)						end of 6
end of 7						125,305	(3,580)						end of 7
end of 8						131,570	(3,759)						end of 8
end of 9						138,149	(3,947)						end of 9
end of 10						145,056	(4,144)						end of 10
end of 11						152,309	(4,352)						end of 11
end of 12						159,924	(4,569)						end of 12
end of 13						167,921	(4,798)						end of 13
end of 14						176,317	(5,038)						end of 14
end of 15						179,843	0						end of 15
end of 16						183,440	0						end of 16
							(40,844)						

Orange backgrounds indicate hypothetical returns

SIPS
Retirement
Planning System

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.