

# Editing the Social Security Age

09/16/2024 11:23 am EDT

On the structured income planning page, you have the ability to edit the start age for social security disbursements. Below is a step-by-step guide for editing the age to start social security.

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

The screenshot displays the 'Structured Income Planning' interface. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these, a breadcrumb trail includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The main heading is 'Structured Income Planning', with an 'Edit' button (highlighted by a red arrow) and a 'Dynamic Mode' button. A 'Scenario' dropdown menu is set to 'New Scenario'. Below this, a 'Planning Horizon' dropdown is set to '20 years'. The main data table has columns for 'Year', 'Account', 'Income', 'Accounts Total', 'Planned Distribution', 'SS', 'Total Income', and 'Year'. The 'SS' column contains orange background cells, indicating hypothetical returns. A legend at the bottom left states 'Orange backgrounds indicate hypothetical returns'. The SIPS Retirement Planning System logo is in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' are in the bottom right.

Step 2: Manage: Click on the green Manage button that is located in the Income column for the social security.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY: \_\_\_\_\_  
INITIAL PLAN DATE: \_\_\_\_\_  
REVISED PLAN DATE: \_\_\_\_\_

## Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon:

Year	SS	Total Income	Year
net return			
initial amount	60		
bonus % w/bonus			
end of 1	0		end of 1
end of 2	0		end of 2
end of 3	0		end of 3
end of 4	0		end of 4
end of 5	31,642		end of 5
end of 6	32,655		end of 6
end of 7	33,699		end of 7
end of 8	34,778		end of 8
end of 9	35,891		end of 9
end of 10	37,039		end of 10
end of 11	38,225		end of 11
end of 12	39,448		end of 12
end of 13	40,710		end of 13
end of 14	42,013		end of 14
end of 15	43,357		end of 15
end of 16	44,745		end of 16
end of 17	46,176		end of 17
end of 18	47,654		end of 18
end of 19	49,179		end of 19
end of 20	50,753		end of 20
	647,963		

Orange backgrounds indicate hypothetical returns

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Step 3: Age to Begin Income: Highlight the numeric number in the text box, delete the number and type in the new age you would like to social security amounts to start in.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Income

[Save](#) [Cancel](#)

Other income name:

This is a Social Security income:

First year income:

Inflation rate:

Number of months of income in first year:

Income description:

Delay the income start until age:

Age to begin income:   Client 1 age  Client 2 age

Tax calculation option:

Income Adjustments

ADD ADJUSTMENT:

Pick year(s):

Pick year(s) to remove:

Reset all years:

Year	Income adjustment
<input type="checkbox"/> 1	
<input type="checkbox"/> 2	
<input type="checkbox"/> 3	
<input type="checkbox"/> 4	
<input type="checkbox"/> 5	
<input type="checkbox"/> 6	
<input type="checkbox"/> 7	
<input type="checkbox"/> 8	
<input type="checkbox"/> 9	
<input type="checkbox"/> 10	
<input type="checkbox"/> 11	
<input type="checkbox"/> 12	
<input type="checkbox"/> 13	
<input type="checkbox"/> 14	
<input type="checkbox"/> 15	
<input type="checkbox"/> 16	
<input type="checkbox"/> 17	
<input type="checkbox"/> 18	
<input type="checkbox"/> 19	
<input type="checkbox"/> 20	
<input type="checkbox"/> 21	
<input type="checkbox"/> 22	
<input type="checkbox"/> 23	
<input type="checkbox"/> 24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

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PRIVACY POLICY | TERMS OF USE

Step 4: Save: Click on the green Save button underneath the Manage Income subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Manage Income

Save Cancel

Other income name

This is a Social Security income

First year income

Inflation rate

Number of months of income in first year

Income description

Delay the income start until age

Age to begin income   Client 1 age  Client 2 age

Tax calculation option

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
<input type="checkbox"/> 1	
<input type="checkbox"/> 2	
<input type="checkbox"/> 3	
<input type="checkbox"/> 4	
<input type="checkbox"/> 5	
<input type="checkbox"/> 6	
<input type="checkbox"/> 7	
<input type="checkbox"/> 8	
<input type="checkbox"/> 9	
<input type="checkbox"/> 10	
<input type="checkbox"/> 11	
<input type="checkbox"/> 12	
<input type="checkbox"/> 13	
<input type="checkbox"/> 14	
<input type="checkbox"/> 15	
<input type="checkbox"/> 16	
<input type="checkbox"/> 17	
<input type="checkbox"/> 18	
<input type="checkbox"/> 19	
<input type="checkbox"/> 20	
<input type="checkbox"/> 21	
<input type="checkbox"/> 22	
<input type="checkbox"/> 23	
<input type="checkbox"/> 24	

Orange backgrounds indicate hypothetical returns

Note that entered values WILL roll down to following years when blank

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 5: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY:

INITIAL PLAN DATE:

REVISED PLAN DATE:

## Structured Income Planning

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

Scenario

Planning Horizon

Year	SS	Total Income	Year
net return			
initial amount			
bonus %			
w/bonus			
end of 1	0		end of 1
end of 2	0		end of 2
end of 3	0		end of 3
end of 4	0		end of 4
end of 5	0		end of 5
end of 6	0		end of 6
end of 7	0		end of 7
end of 8	0		end of 8
end of 9	0		end of 9
end of 10	45,255		end of 10
end of 11	46,703		end of 11
end of 12	48,198		end of 12
end of 13	49,740		end of 13
end of 14	51,332		end of 14
end of 15	52,974		end of 15
end of 16	54,669		end of 16
end of 17	56,419		end of 17
end of 18	58,224		end of 18
end of 19	60,087		end of 19
end of 20	62,010		end of 20
	585,612		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 6: Saving the Structured Income Planning scenario: Click the green Save button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY: \_\_\_\_\_  
INITIAL PLAN DATE: \_\_\_\_\_  
REVISED PLAN DATE: \_\_\_\_\_

## Structured Income Planning

[Edit](#) | [Save](#) | [Cancel](#) | [Add Account](#) | [Add Income](#) | [Add Inc Tax](#) | [Add Target](#) | [Edit or Add Scenario](#) | [Display Options](#)

Scenario:

Planning Horizon: 20 years

Year	SS	Total Income	Year
net return			
initial amount	60		
bonus % w/bonus			
end of 1	0		end of 1
end of 2	0		end of 2
end of 3	0		end of 3
end of 4	0		end of 4
end of 5	0		end of 5
end of 6	0		end of 6
end of 7	0		end of 7
end of 8	0		end of 8
end of 9	0		end of 9
end of 10	45,255		end of 10
end of 11	46,703		end of 11
end of 12	48,198		end of 12
end of 13	49,740		end of 13
end of 14	51,332		end of 14
end of 15	52,974		end of 15
end of 16	54,669		end of 16
end of 17	56,419		end of 17
end of 18	58,224		end of 18
end of 19	60,087		end of 19
end of 20	62,010		end of 20
	585,612		

Orange backgrounds indicate hypothetical returns

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Step 7: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY: \_\_\_\_\_  
INITIAL PLAN DATE: \_\_\_\_\_  
REVISED PLAN DATE: \_\_\_\_\_

## Structured Income Planning

[Edit](#) | [Save](#) | [Cancel](#) | [Add Account](#) | [Add Income](#) | [Add Inc Tax](#) | [Add Target](#) | [Edit or Add Scenario](#) | [Display Options](#)

Scenario:

Planning Horizon: 2 years

Year	SS	Total Income	Year
net return			
initial amount	60		
bonus % w/bonus			
end of 1	0		end of 1
end of 2	0		end of 2
end of 3	0		end of 3
end of 4	0		end of 4
end of 5	0		end of 5
end of 6	0		end of 6
end of 7	0		end of 7
end of 8	0		end of 8
end of 9	0		end of 9
end of 10	45,255		end of 10
end of 11	46,703		end of 11
end of 12	48,198		end of 12
end of 13	49,740		end of 13
end of 14	51,332		end of 14
end of 15	52,974		end of 15
end of 16	54,669		end of 16
end of 17	56,419		end of 17
end of 18	58,224		end of 18
end of 19	60,087		end of 19
end of 20	62,010		end of 20
	585,612		

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 8: 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

## Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario:

Planning Horizon:

Year	SS	Total Income	Year
net return			
initial amount	60		
bonus % w/bonus			
	Infl Factor		
	3.20 %		
end of 1	0		end of 1
end of 2	0		end of 2
end of 3	0		end of 3
end of 4	0		end of 4
end of 5	31,642		end of 5
end of 6	32,655		end of 6
end of 7	33,699		end of 7
end of 8	34,778		end of 8
end of 9	35,891		end of 9
end of 10	37,039		end of 10
end of 11	38,225		end of 11
end of 12	39,448		end of 12
end of 13	40,710		end of 13
end of 14	42,013		end of 14
end of 15	43,357		end of 15
end of 16	44,745		end of 16
end of 17	46,176		end of 17
end of 18	47,654		end of 18
end of 19	49,179		end of 19
end of 20	50,753		end of 20
	647,963		

Orange backgrounds indicate hypothetical returns

SIPS Structured Income Planning System

PRIVACY POLICY | TERMS OF USE

Step 9: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | **SIGN OUT**

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

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

## Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario:

Planning Horizon:

Year	SS	Total Income	Year
net return			
initial amount	60		
bonus % w/bonus			
	Infl Factor		
	3.20 %		
end of 1	0		end of 1
end of 2	0		end of 2
end of 3	0		end of 3
end of 4	0		end of 4
end of 5	31,642		end of 5
end of 6	32,655		end of 6
end of 7	33,699		end of 7
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end of 9	35,891		end of 9
end of 10	37,039		end of 10
end of 11	38,225		end of 11
end of 12	39,448		end of 12
end of 13	40,710		end of 13
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	647,963		

Orange backgrounds indicate hypothetical returns

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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](mailto:support@planscout.com).