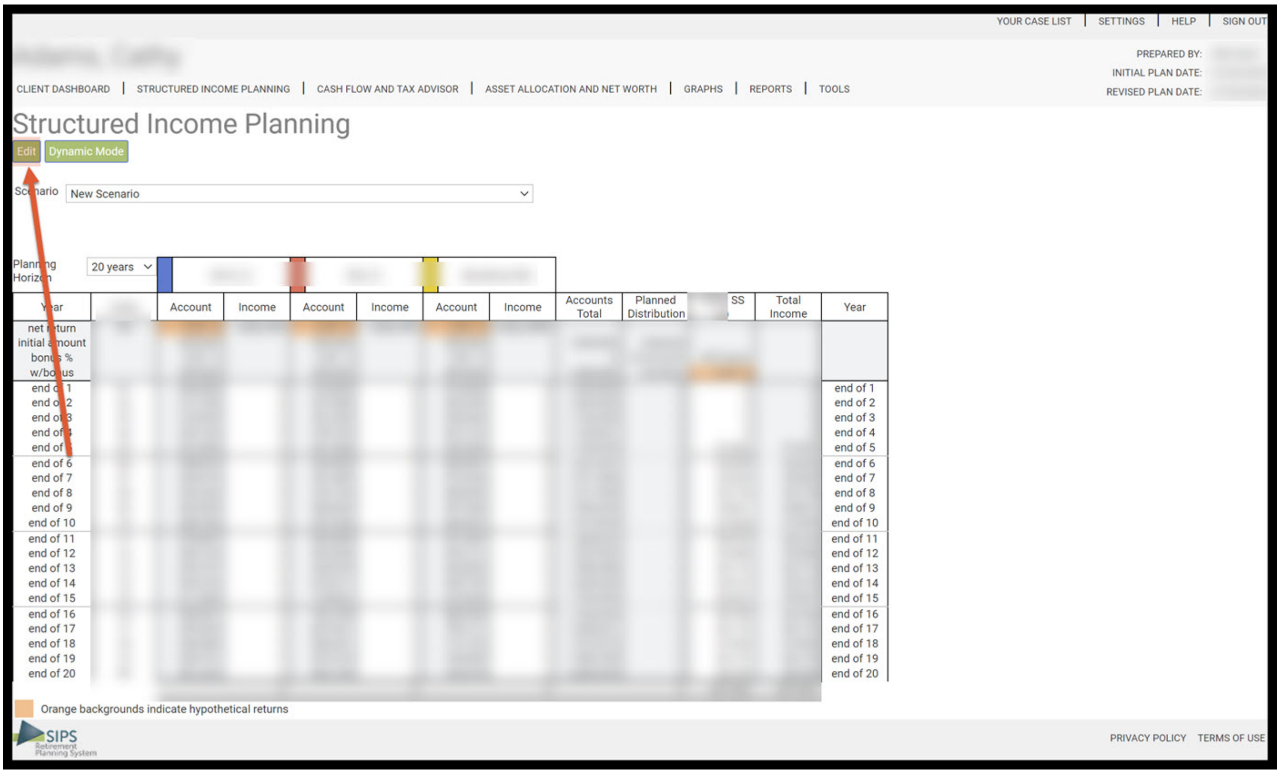
Viewing Calendar Years instead of Plan Years

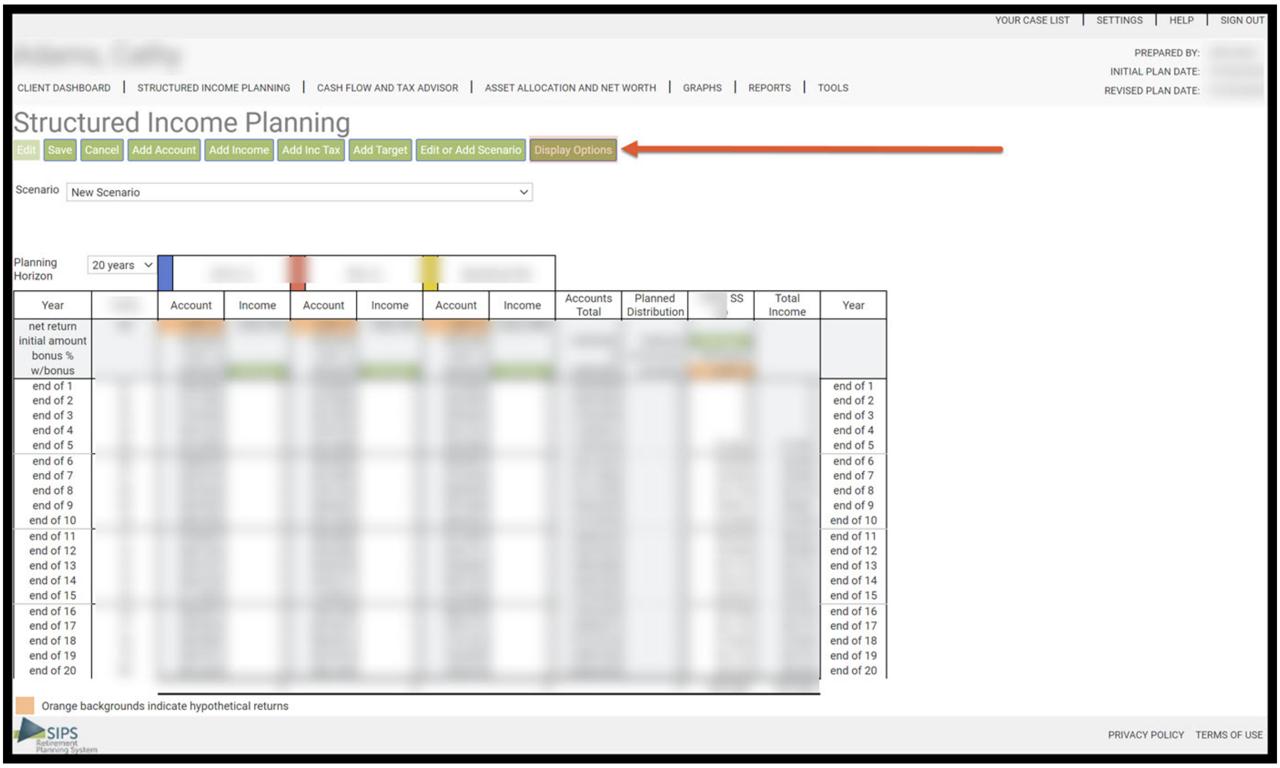
09/17/2024 1:50 pm EDT

Within the Display Options within the structured income planning page, you can edit the structured income plan to show the calendar years instead of the plan years. Below is a step-by-step guide for viewing the calendar years.

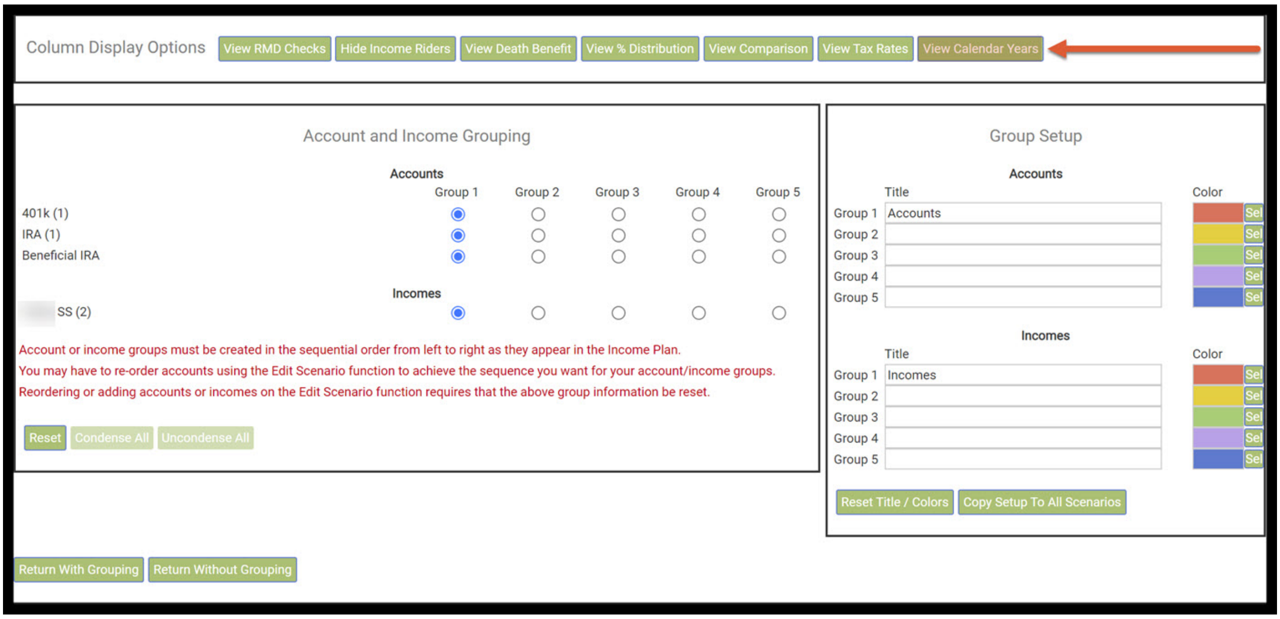
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



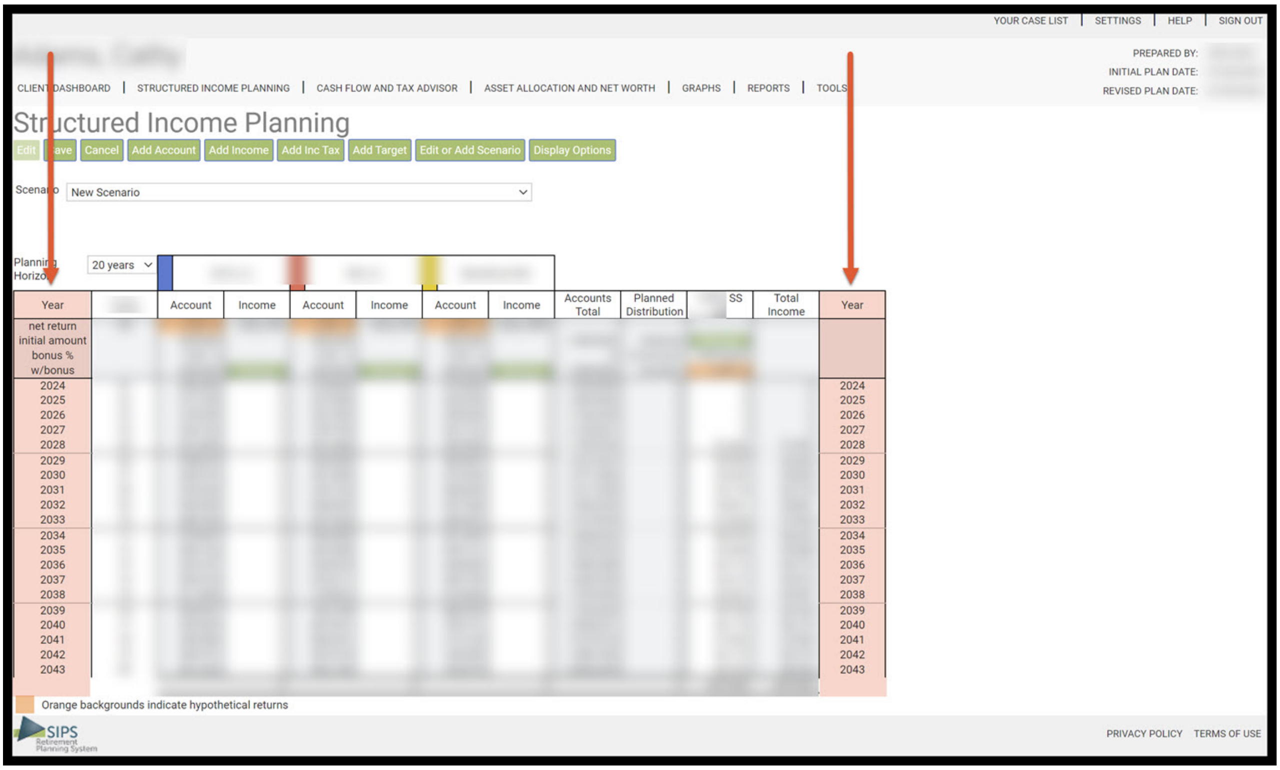
Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.



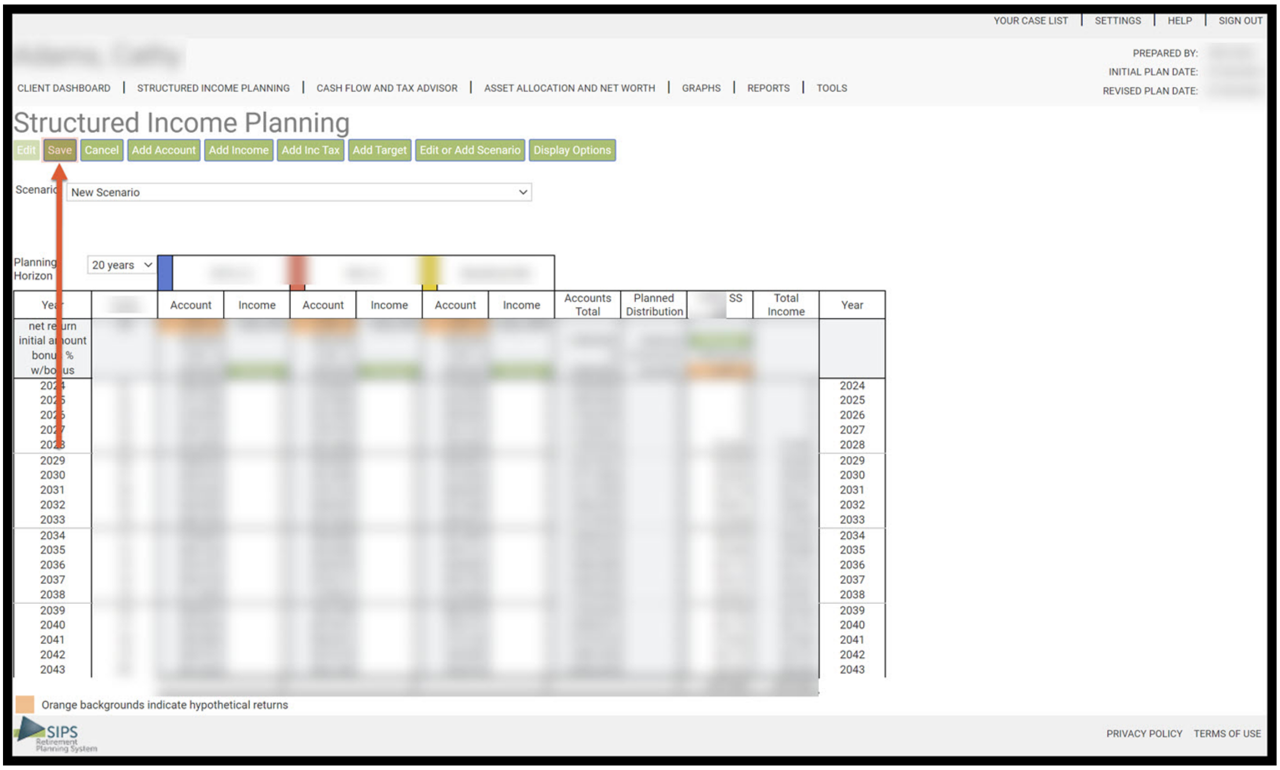
Step 3: View Calendar Years: Click on the green View Calendar Years button in the Column Display Options Table.



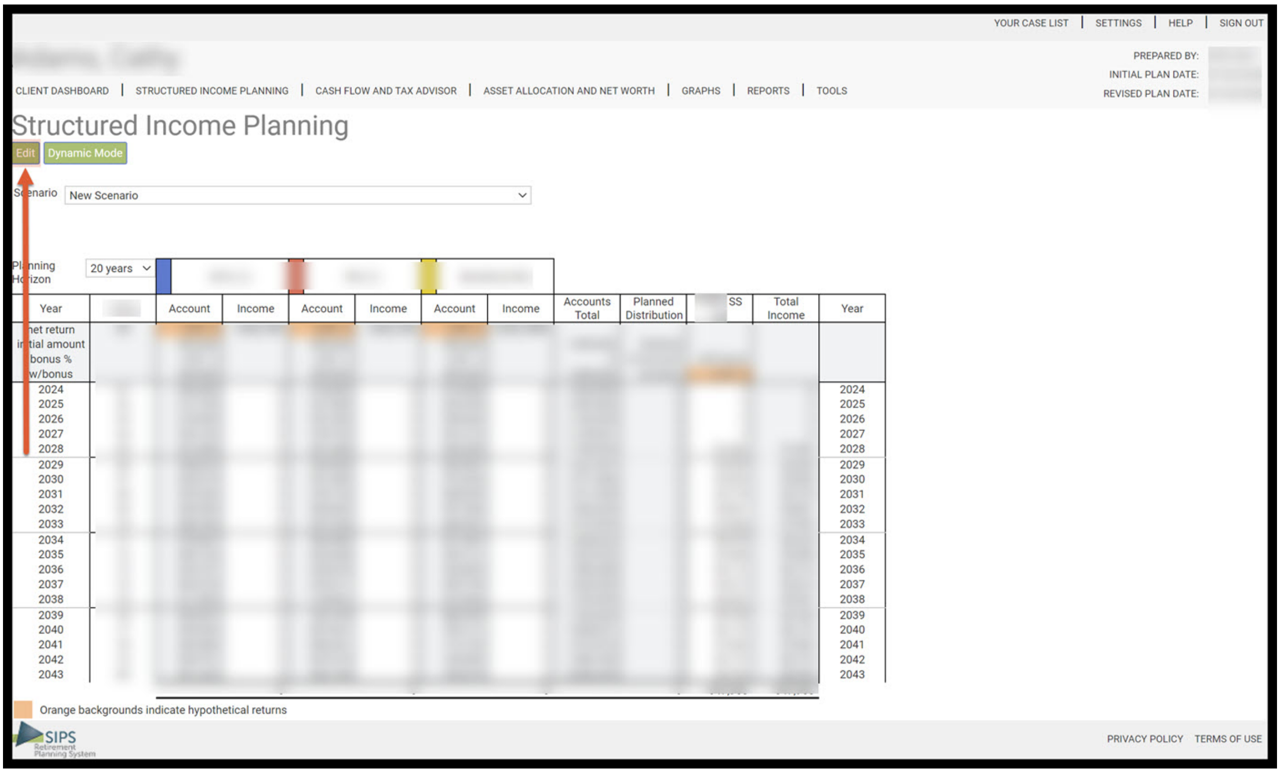
Step 4: Structured Income Planning Page: The Year columns will change to the calendar years.



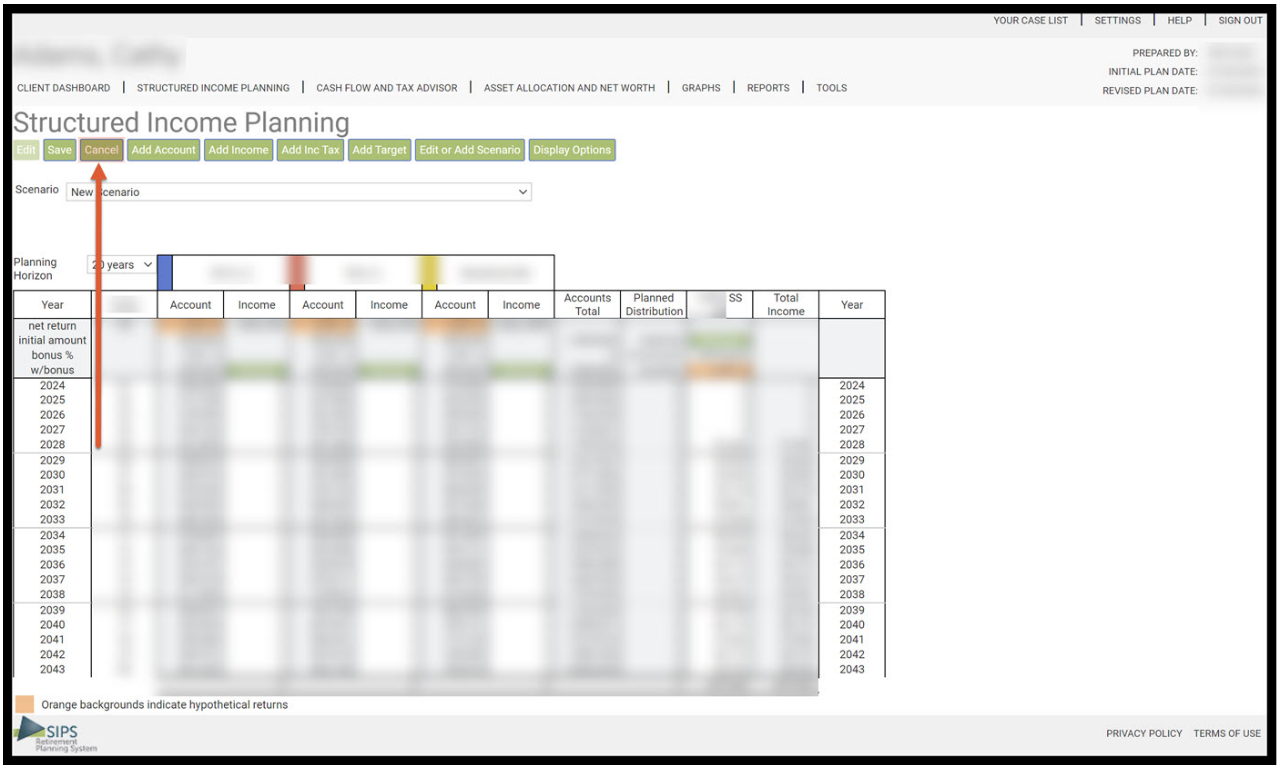
Step 5: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



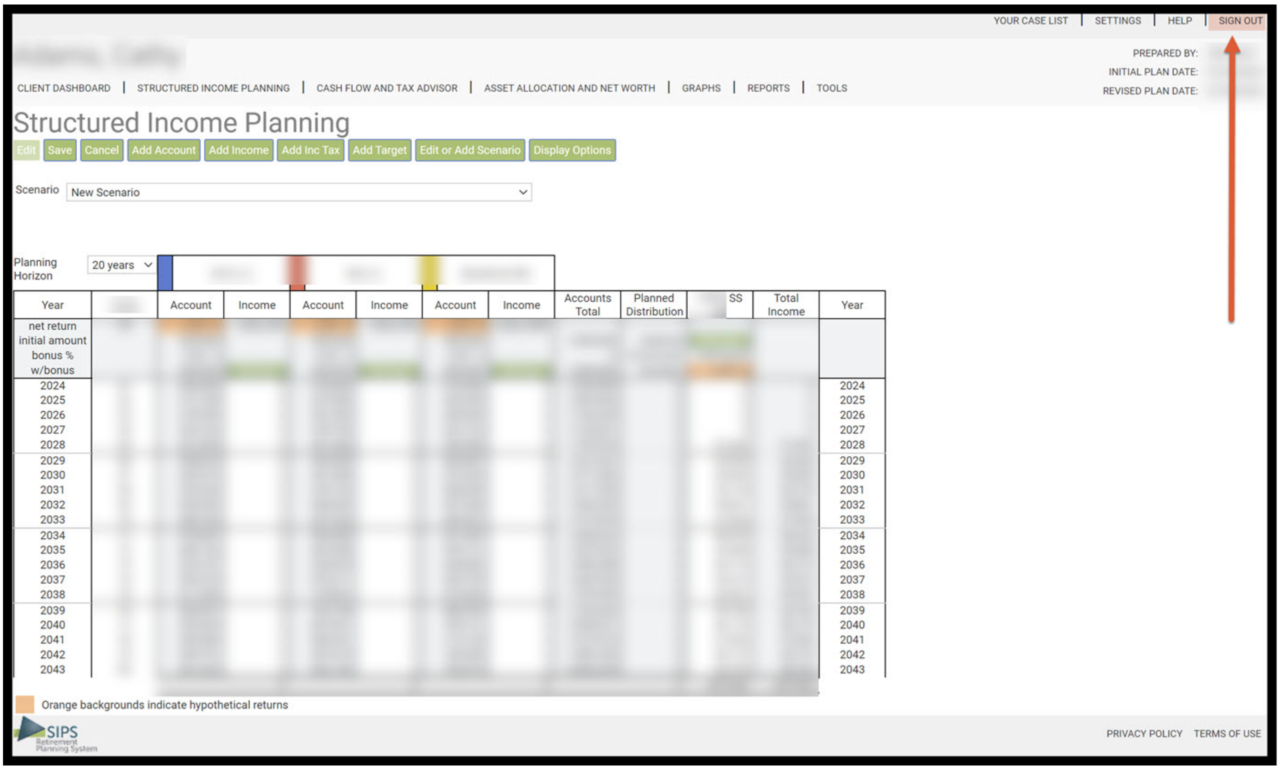
Step 6: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



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



Step 8: 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.