

Changing the Colors of the Allocation Codes

12/09/2024 4:53 pm EST

Underneath the settings subheading you can go to the allocation codes page. On this page you can edit many different items with the allocation codes. Below is a step by step guideline for changing the colors of the allocation codes.

Step 1: Log In: Log in into SIPS.



Step 2: Settings: Click on the settings button located on the right hand side of your screen.



Step 3: Allocation Codes: Click on the Allocation codes button on the right-hand side of the screen.

Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

Save Cancel Select New Logo (*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload

User id
 Old password
 New password
 Please re-enter new password
 Email address

Company Name
 Company Address
 Company Address
 Company Phone
 Company Website
 Company Email

Step 4: Sel: Click on the green Sel button next to code that you would like to change the color for.

Allocation Code List

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Sel	0.00	5.00	n/a	0
10904	non Qual	Sel	0.00		n/a	0
10905	Qualified	Sel	0.00		n/a	0
10906	green	Sel	0.00		n/a	0
10907	yellow	Sel	0.00		n/a	0
10908	red	Sel	0.00		n/a	0
10909	safe	Sel	0.00		Fixed Interest	0
10910	risk	Sel	0.00		Aggressive	0
10911	Fixed Interest	Sel	0.00		Fixed Interest	0
10912	Indexed Annuity	Sel	0.00		Indexed Annuity	0
10913	Conservative	Sel	0.00		Conservative	0
10914	Moderately Conservative	Sel	0.00		Moderately Conservative	0
10915	Moderate	Sel	0.00		Moderate	0
10916	Moderately Aggressive	Sel	0.00		Moderately Aggressive	0
10917	Aggressive	Sel	0.00		Aggressive	0

Step 5: Color Selection: Pick which color selection you would like to go with.

Allocation Code List

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Sel	0.00	5.00	n/a	0
10904	non Qual	Sel	0.00		n/a	0
10905	Qualified	Sel	0.00		n/a	0
10906	green	Sel	0.00		n/a	0
10907	yellow	Sel	0.00		n/a	0
10908	red	Sel	0.00		n/a	0
10909	safe	Sel	0.00		Fixed Interest	0
10910	risk	Sel	0.00		Aggressive	0
10911	Fixed Interest	Sel	0.00		Fixed Interest	0
10912	Indexed Annuity	Sel	0.00		Indexed Annuity	0
10913	Conservative	Sel	0.00		Conservative	0
10914	Moderately Conservative	Sel	0.00		Moderately Conservative	0
10915	Moderate	Sel	0.00		Moderate	0
10916	Moderately Aggressive	Sel	0.00		Moderately Aggressive	0
10917	Aggressive	Sel	0.00		Aggressive	0

Step 6: Save: Click on the green save button underneath the Allocation Code List heading.

The screenshot shows the 'Allocation Code List' page. At the top left, there are three buttons: 'Save' (green), 'Cancel' (grey), and 'Add Allocation Code' (green). A red arrow points to the 'Save' button. The main area contains a table with columns: Allocation Id, Code, Color, Default %, Maximum %, Risk level, and Replace With Id. The table lists 17 allocation codes from 10903 to 10917. On the right side of the table, there are 'Del' buttons for each row.

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	blue	0.00	5.00	n/a	0
10904	non Qual	blue	0.00		n/a	0
10905	Qualified	red	0.00		n/a	0
10906	green	green	0.00		n/a	0
10907	yellow	yellow	0.00		n/a	0
10908	red	red	0.00		n/a	0
10909	safe	green	0.00		Fixed Interest	0
10910	risk	red	0.00		Aggressive	0
10911	Fixed Interest	green	0.00		Fixed Interest	0
10912	Indexed Annuity	green	0.00		Indexed Annuity	0
10913	Conservative	yellow	0.00		Conservative	0
10914	Moderately Conservative	blue	0.00		Moderately Conservative	0
10915	Moderate	blue	0.00		Moderate	0
10916	Moderately Aggressive	orange	0.00		Moderately Aggressive	0
10917	Aggressive	purple	0.00		Aggressive	0

Step 7: Your Case List: Click on the Your Case List button on the right hand side of your screen.

The screenshot shows the 'Allocation Code List' page. At the top right, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. A red arrow points to the 'YOUR CASE LIST' link. The rest of the page content is identical to the previous screenshot.

Step 8: View All Cases: Click on the green View All Cases button.

The screenshot shows the 'Your Case List' page. At the top left, there are three buttons: 'Add Case' (green), 'View All Cases' (green), and 'Search Using Selection' (green). A red arrow points to the 'View All Cases' button. Below the buttons is a search bar labeled 'Search for Case'. At the bottom, there is a table header with columns: Case, Initial Plan Date, Revised Date, Tags, and Active.

Step 9: Case Selection: Select a case.

Your Case List YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

[Add Case](#) [View All Cases](#) [Search Using Selection](#)

Search for Case:

Case	Initial Plan Date	Revised Date	Tags	Active
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del
[blurred]	[blurred]	[blurred]	[blurred]	<input checked="" type="checkbox"/> Del

Rows Per Page: 50 Page 1 of 1

Step 10: GoTo Incomes: Click on the green GoTo Incomes underneath the Client Information heading.

Client Information 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](#)

[CLIENT INFORMATION](#) | [INCOMES](#) | [ASSETS](#) | [GOALS AND OBJECTIVES](#) | [RECOMMENDATIONS](#) | [ADVISOR NOTES](#) | [DISCLOSURE](#)

PREPARED BY: [blurred]
 INITIAL PLAN DATE: [blurred]
 REVISED PLAN DATE: [blurred]

[Edit](#) [GoTo Incomes >>](#)

Case Title: [blurred]
 Description: [blurred]

Client one: Last: [blurred], First: [blurred], Date of birth: [blurred], Initial plan age: [blurred], Current age: [blurred], Retirement age: [blurred], Gender: Female

Client two: Last: [blurred], First: [blurred], Date of birth: [blurred], Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Female

Selection tags: [blurred] Active

Initial plan date: [blurred]
 Revision date: [blurred]
 Address: [blurred]
 City, State, Zip: [blurred]
 Email: [blurred]
 Phone: [blurred]
 Cell Phone: [blurred]
 Cell Phone: [blurred]

List Clients Beneficiaries (optional)

Step 11: GoTo Assets: Click on the green GoTo Assets underneath the Incomes heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Incomes

[Edit] [Goto Assets >>]

Wages/Income

Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %	0.0	Expected wage increase while working %	0.0	

Social security

At age	Yearly amount	Social security	At age	Yearly amount
62	\$22,727	Projected benefits	unknown	
66	\$30,303	Projected benefits	70	
70	\$40,000	OR Current benefit if already retired	Expected COLA increase %	0.0
OR Current benefit if already retired		Expected COLA increase %		

Pensions

At age	Yearly amount	Pensions	At age	Yearly amount
0		Projected benefits	0	
OR Current benefit if already retired		OR Current benefit if already retired	Expected COLA increase %	0.0
Expected COLA increase %	0.0	Expected COLA increase %		

Step 12: Current Monetary Assets Allocation: The Allocation should be written in the color that you have selected.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Assets

[Edit] [Create Planning Scenario]

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Roth IRA	[REDACTED]	IRA	Mod	Moderate	3.0	\$1,000,000
401(k)	[REDACTED]	401k	Aggr	Aggressive	6.0	\$1,000,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Step 13: Structured Income Planning: Click on the Structured Income Planning button located on the left-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

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

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Assets

[Edit] [Create Planning Scenario]

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Roth IRA	[REDACTED]	IRA	Mod	Moderate	3.0	\$1,000,000
401(k)	[REDACTED]	401k	Aggr	Aggressive	6.0	\$1,000,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Step 14: Accounts: The Accounts color should be changed to the one you have selection on the Allocation Codes page.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

Edit | Dynamic Mode

Scenario: Planning Horizon Timeline

Planning Horizon: 16 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes			Total Income	Year	
	Account	Income	Account	Income			Wages	Pension	SS			
net return	70	6.00 %	IRA	4.00 %								
initial amount		665,000		100,000	765,000	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor			
bonus % w/bonus		0.00 %		0.00 %	765,000		2.20 %	3.20 %	2.20 %			
end of 1	71	704,900	0	104,000	808,900	0	175,000	30,000	28,282	233,282	end of 1	
end of 2	72	747,194	0	108,160	855,354	0	178,850	30,960	28,904	238,714	end of 2	
end of 3	73	792,025	0	112,486	904,512	0	182,785	31,951	29,540	244,275	end of 3	
end of 4	74	839,547	0	116,986	956,533	0	186,806	32,973	30,190	249,969	end of 4	
end of 5	75	889,920	0	121,665	1,011,585	0	190,916	34,028	30,854	255,798	end of 5	
end of 6	76	943,315	0	126,532	1,069,847	0	195,116	35,117	31,533	261,766	end of 6	
end of 7	77	999,914	0	131,593	1,131,507	0	199,408	36,241	32,227	267,876	end of 7	
end of 8	78	1,059,908	0	136,857	1,196,765	0	203,795	37,401	32,936	274,132	end of 8	
end of 9	79	1,123,503	0	142,331	1,265,834	0	208,279	38,597	33,660	280,536	end of 9	
end of 10	80	1,190,913	0	148,024	1,338,937	0	212,861	39,833	34,401	287,094	end of 10	
end of 11	81	1,262,368	0	153,945	1,416,313	0	217,544	41,107	35,158	293,809	end of 11	
end of 12	82	1,338,110	0	160,103	1,498,213	0	222,330	42,423	35,931	300,683	end of 12	
end of 13	83	1,418,396	0	166,507	1,584,904	0	227,221	43,780	36,722	307,723	end of 13	
end of 14	84	1,503,500	0	173,168	1,676,668	0	232,220	45,181	37,529	314,930	end of 14	
end of 15	85	1,593,710	0	180,094	1,773,804	0	237,329	46,627	38,355	322,311	end of 15	
end of 16	86	1,689,332	0	187,298	1,876,630	0	242,550	48,119	39,199	329,868	end of 16	
			0		0		0	3,313,008	614,338	535,420	4,462,766	

Orange backgrounds indicate hypothetical returns

Step 15: 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

PREPARED BY: [REDACTED]
 INITIAL PLAN DATE: [REDACTED]
 REVISED PLAN DATE: [REDACTED]

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

Structured Income Planning

Edit | Dynamic Mode

Scenario: Planning Horizon Timeline

Planning Horizon: 16 years

Year	Accounts				Accounts Total	Planned Distribution	Incomes			Total Income	Year	
	Account	Income	Account	Income			Wages	Pension	SS			
net return	70	6.00 %	IRA	4.00 %								
initial amount		665,000		100,000	765,000	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor			
bonus % w/bonus		0.00 %		0.00 %	765,000		2.20 %	3.20 %	2.20 %			
end of 1	71	704,900	0	104,000	808,900	0	175,000	30,000	28,282	233,282	end of 1	
end of 2	72	747,194	0	108,160	855,354	0	178,850	30,960	28,904	238,714	end of 2	
end of 3	73	792,025	0	112,486	904,512	0	182,785	31,951	29,540	244,275	end of 3	
end of 4	74	839,547	0	116,986	956,533	0	186,806	32,973	30,190	249,969	end of 4	
end of 5	75	889,920	0	121,665	1,011,585	0	190,916	34,028	30,854	255,798	end of 5	
end of 6	76	943,315	0	126,532	1,069,847	0	195,116	35,117	31,533	261,766	end of 6	
end of 7	77	999,914	0	131,593	1,131,507	0	199,408	36,241	32,227	267,876	end of 7	
end of 8	78	1,059,908	0	136,857	1,196,765	0	203,795	37,401	32,936	274,132	end of 8	
end of 9	79	1,123,503	0	142,331	1,265,834	0	208,279	38,597	33,660	280,536	end of 9	
end of 10	80	1,190,913	0	148,024	1,338,937	0	212,861	39,833	34,401	287,094	end of 10	
end of 11	81	1,262,368	0	153,945	1,416,313	0	217,544	41,107	35,158	293,809	end of 11	
end of 12	82	1,338,110	0	160,103	1,498,213	0	222,330	42,423	35,931	300,683	end of 12	
end of 13	83	1,418,396	0	166,507	1,584,904	0	227,221	43,780	36,722	307,723	end of 13	
end of 14	84	1,503,500	0	173,168	1,676,668	0	232,220	45,181	37,529	314,930	end of 14	
end of 15	85	1,593,710	0	180,094	1,773,804	0	237,329	46,627	38,355	322,311	end of 15	
end of 16	86	1,689,332	0	187,298	1,876,630	0	242,550	48,119	39,199	329,868	end of 16	
			0		0		0	3,313,008	614,338	535,420	4,462,766	

Orange backgrounds indicate hypothetical returns

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