

Changing the Colors of the Allocation Codes

01/02/2026 9:11 am 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

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Save Cancel Add Allocation Code

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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

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YOUR CASE LIST

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Allocation Code List

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	<div>Sel</div>	0.00	5.00	n/a	<div>0</div>
10904	non Qual	<div>Sel</div>	0.00		n/a	<div>0</div>
10905	Qualified	<div>Sel</div>	0.00		n/a	<div>0</div>
10906	green	<div>Sel</div>	0.00		n/a	<div>0</div>
10907	yellow	<div>Sel</div>	0.00		n/a	<div>0</div>
10908	red	<div>Sel</div>	0.00		n/a	<div>0</div>
10909	safe	<div>Sel</div>	0.00		Fixed Interest	<div>0</div>
10910	risk	<div>Sel</div>	0.00		Aggressive	<div>0</div>
10911	Fixed Interest	<div>Sel</div>	0.00		Fixed Interest	<div>0</div>
10912	Indexed Annuity	<div>Sel</div>	0.00		Indexed Annuity	<div>0</div>
10913	Conservative	<div>Sel</div>	0.00		Conservative	<div>0</div>
10914	Moderately Conservative	<div>Sel</div>	0.00		Moderately Conservative	<div>0</div>
10915	Moderate	<div>Sel</div>	0.00		Moderate	<div>0</div>
10916	Moderately Aggressive	<div>Sel</div>	0.00		Moderately Aggressive	<div>0</div>
10917	Aggressive	<div>Sel</div>	0.00		Aggressive	<div>0</div>

YOUR CASE LIST

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Allocation Code List

Save

Cancel

Add Allocation Code

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ALLOCATION CODES

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10914	Moderately Conservative	<div></div>	0.00		Moderately Conservative	0
10915	Moderate	<div></div>	0.00		Moderate	0
10916	Moderately Aggressive	<div></div>	0.00		Moderately Aggressive	0
10917	Aggressive	<div></div>	0.00		Aggressive	0

[Your Case List](#)
[Settings](#)
[Help](#)
[Sign Out](#)

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

Case	Initial Plan Date	Revised Date	Tags	Active

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	Expected wage increase while working %
			0.0

Social security	At age	Yearly amount	Projected benefits	OR Current benefit if already retired	Expected COLA increase %
	62	\$22,727	66	\$30,303	2.2
			70	\$40,000	

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

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

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Assets

[Edit](#) [Create Planning Scenario](#)

Current Monetary Assets

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

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Current Monetary Assets

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401(k)		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]
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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

		Accounts				Incomes						
		401k		ROTH IRA		Accounts Total	Planned Distribution	Wages	Pension	SS	Total Income	Year
Year		Account	Income	Account	Income							
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 %		0.00 %		0.00 %		0		2.20 %	3.20 %	2.20 %		
w/bonus		665,000		100,000		765,000						
end of 1	71	704,900	0	104,000	0	808,900	0	175,000	30,000	28,282	233,282	end of 1
end of 2	72	747,194	0	108,160	0	855,354	0	178,850	30,960	28,904	238,714	end of 2
end of 3	73	792,025	0	112,486	0	904,512	0	182,785	31,951	29,540	244,275	end of 3
end of 4	74	839,547	0	116,986	0	956,533	0	186,806	32,973	30,190	249,969	end of 4
end of 5	75	889,920	0	121,665	0	1,011,585	0	190,916	34,028	30,854	255,798	end of 5
end of 6	76	943,315	0	126,532	0	1,069,847	0	195,116	35,117	31,533	261,766	end of 6
end of 7	77	999,914	0	131,593	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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	0	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]
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REVISED PLAN DATE: [REDACTED]

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initial amount		665,000		100,000		765,000	Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor		
bonus %		0.00 %		0.00 %		0		2.20 %	3.20 %	2.20 %		
w/bonus		665,000		100,000		765,000						
end of 1	71	704,900	0	104,000	0	808,900	0	175,000	30,000	28,282	233,282	end of 1
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		0		0		0		3,313,008	614,338	535,420	4,462,766	

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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: support@planscout.com.