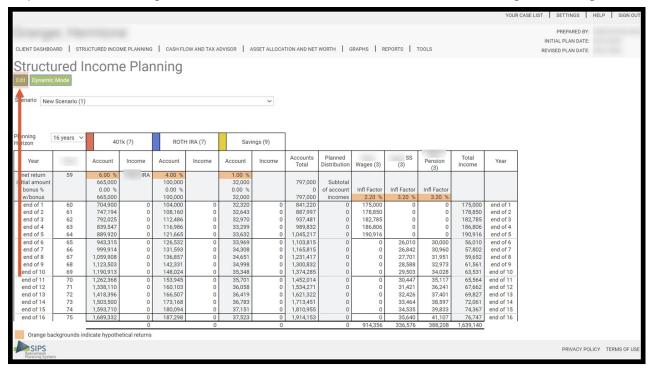
Editing the Years of Distribution Through the Income Adjustment Table on the Manage Income Page

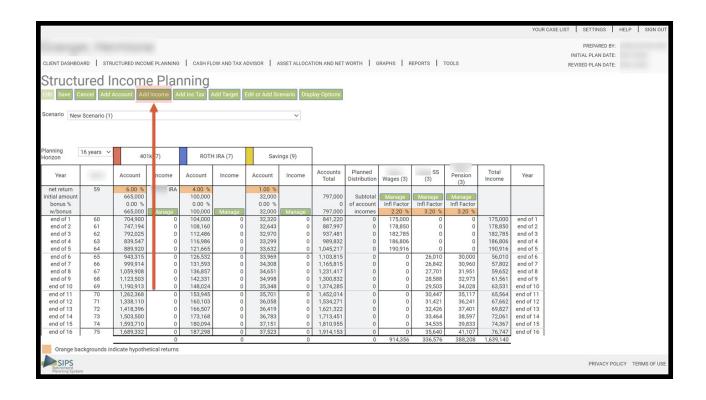
09/17/2024 1:13 pm EDT

Within the Income Adjustment table on the Manage Income page, you can edit the timeframe for how many years you can have the income be distributed. Below are the step-by-step guidelines for editing how many years you can have an income be distributed.

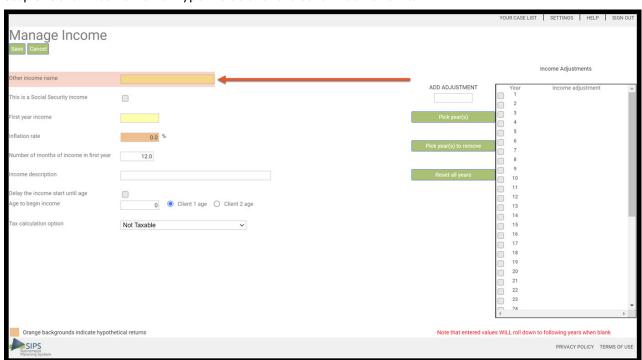
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning heading.



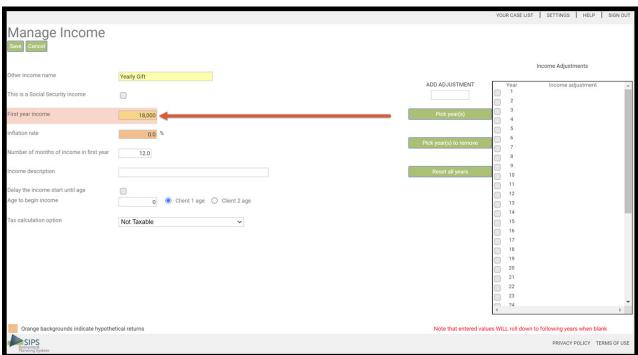
Step 3: Other Income Name: Type in a title for the other income name.



Step 4: Social Security Income: Leave the box unchecked.



Step 5: First Year Income: Type in the numeric amount of income for the first year.



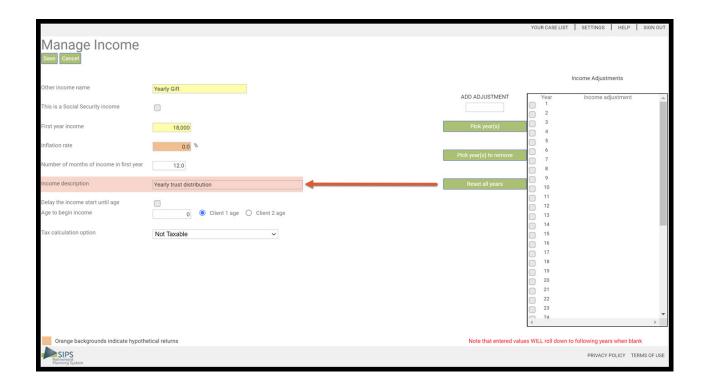
Step 6: Inflation Rate: Type in the inflation rate.



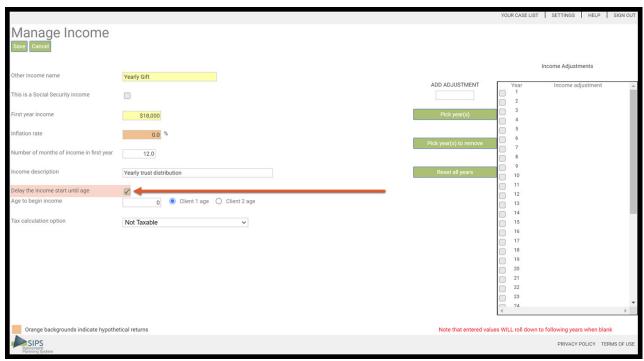
Step 7: Number of Months of Income in First Year: Type in the number of months of income in the first year. The default amount is set a 12.



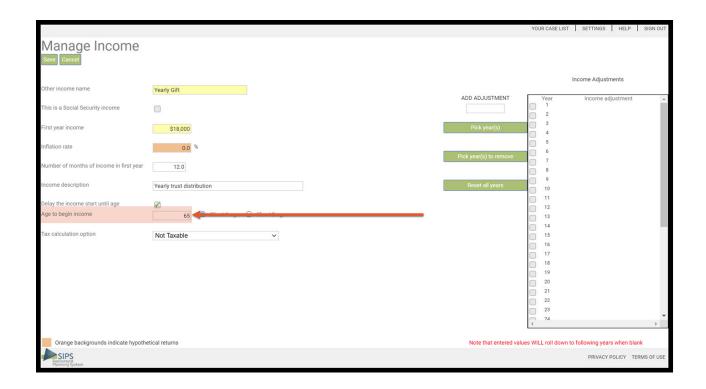
Step 8: Income Description: Type in the income description.



Step 9: Delay the Income Start Until Age: Check this box if the income will start at a different age than the start age of the structured income plan.



Step 10: Age to Begin Income: If the delay the income start until age checkbox was checked. Type in the age to begin income. Default is set to zero, which will start the income in year 1.



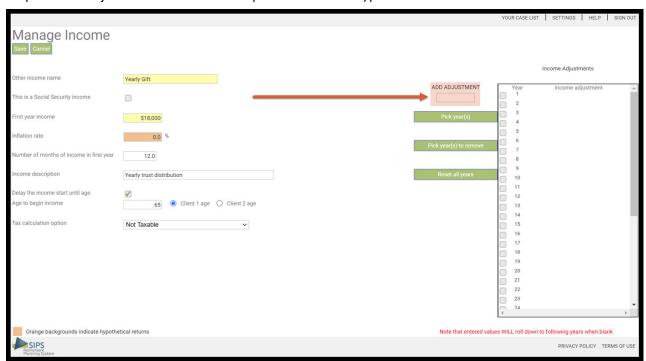
Step 11: Radio Buttons: Click which radio button the income is associated with. The default is set with Client 1.



Step 12: Tax Calculation Option: In the text box, click on the down carrot arrow and select which tax option this income will be.



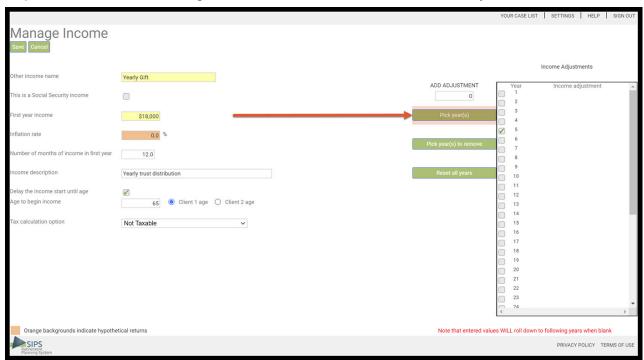
Step 13: Add Adjustment Text Box: To stop the distribution type in the numeric number 0 into the text box.



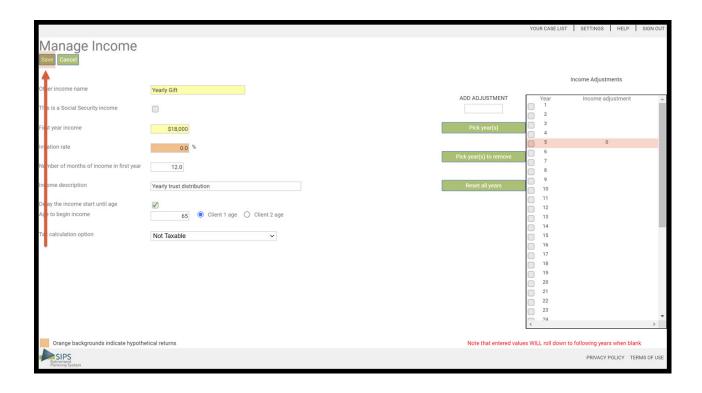
Step 14: Year: Click on the text box of which year the yearly distribution needs to stop by.



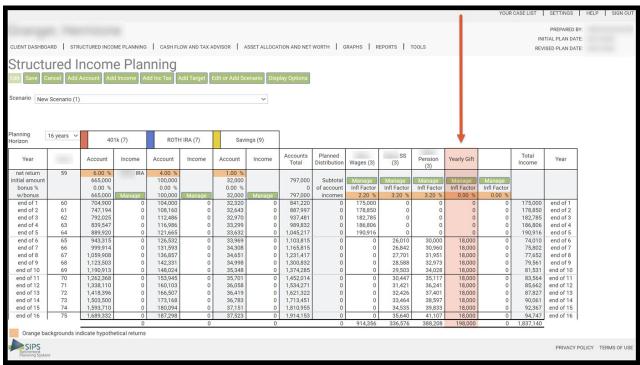
Step 15: Pick Years: Click on the green Pick Years Button underneath the Add Adjustment text box.



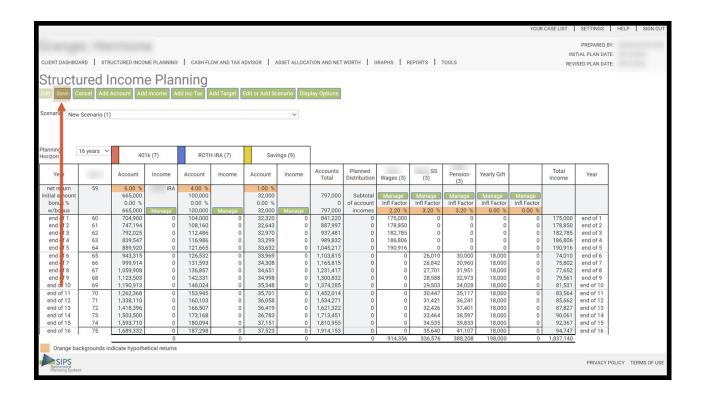
Step 16: Save: Click the green save button underneath the add income subheading.



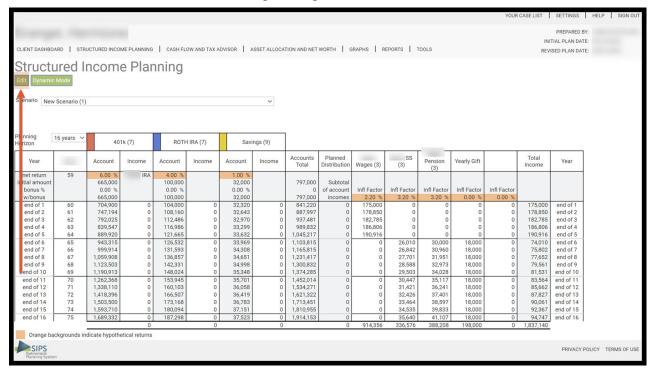
Step 17: Structured Income Planning Page: The new income should have a separate column in the structured income plan.



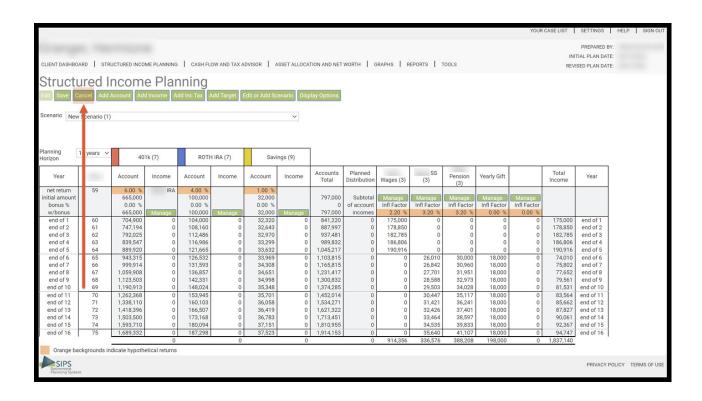
Step 18: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



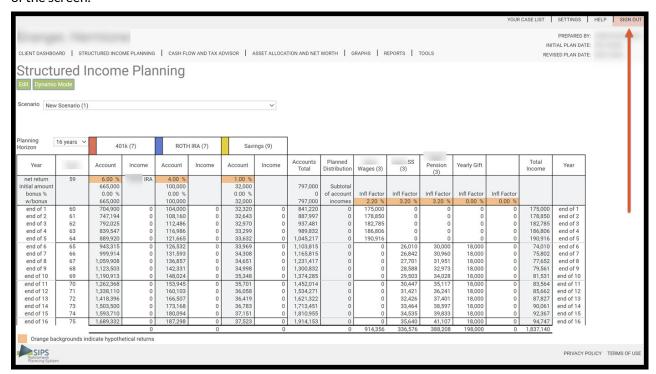
Step 19: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



Step 20: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 21: 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.