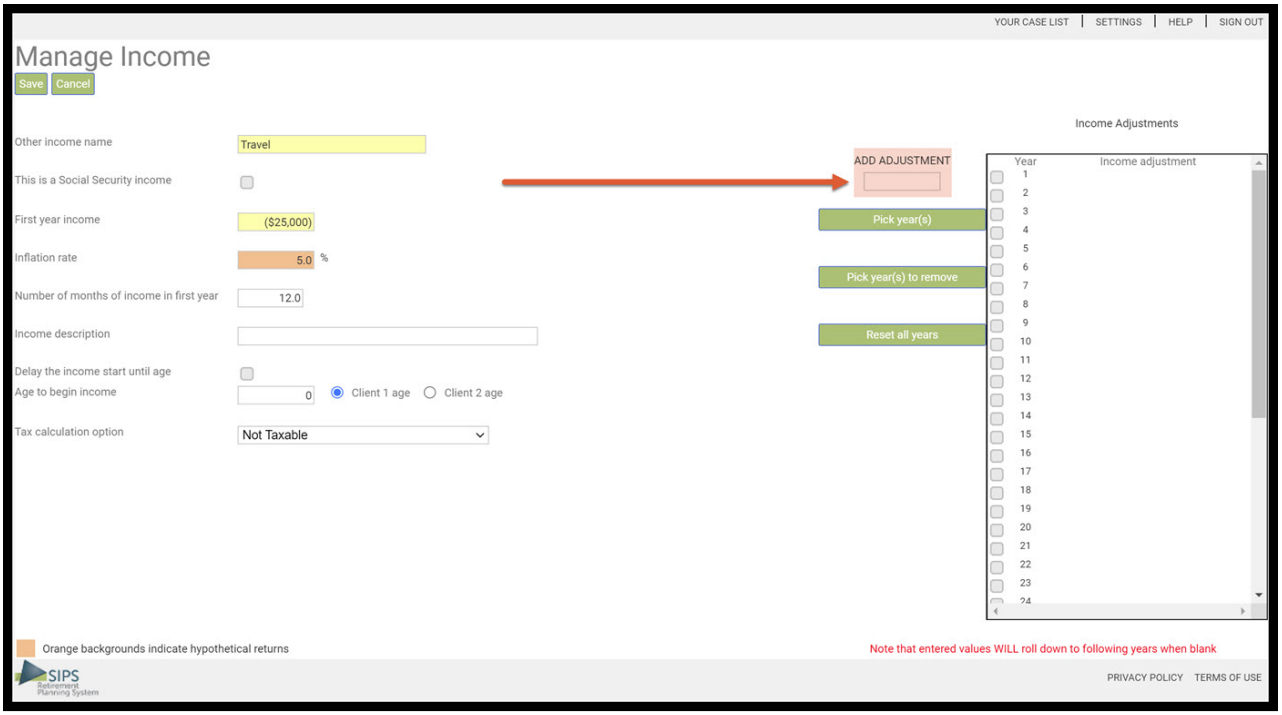
Income Adjustment Table on the Manage Income Page

01/12/2026 10:41 am EST

On the manage income page there is an income adjustment table. This table has the ability to edit the data that has been filtered in through the add income function. Below are the step-by-step guidelines for each of the buttons; Pick Years, Pick Year(s) to Remove, and Reset All Years.

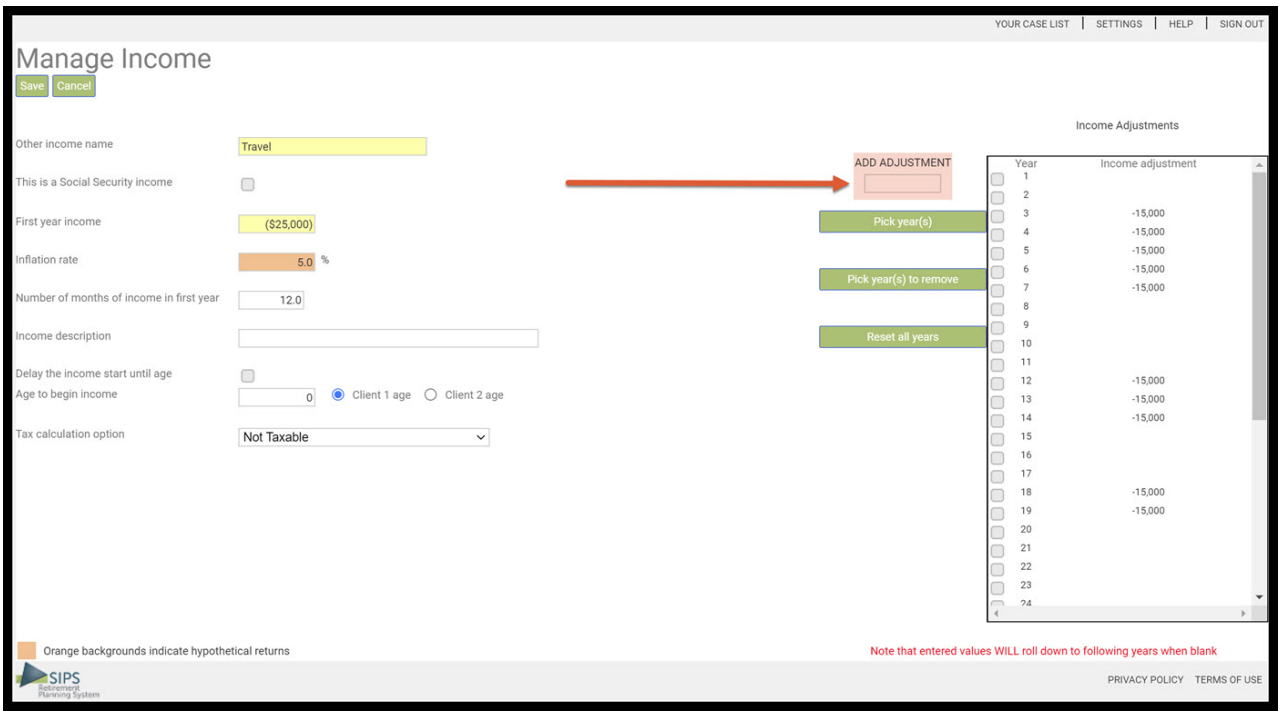
Option A: Pick Years:
Step 1: Add Adjustment Text Box: Type in the numeric number of the specific income. For withdraws the numeric number needs to start with the minus symbol and no commas can separate the numbers.



Step 2: Year: Click on the year text box within the income adjustment table of which years the new income/withdraw will be on.

Step 3: Pick Years: Click on the green Pick Years Button underneath the Add Adjustment text box.

Step 4: Add Adjustment Text Box: To stop the distribution type in the numeric number 0 into the text box.

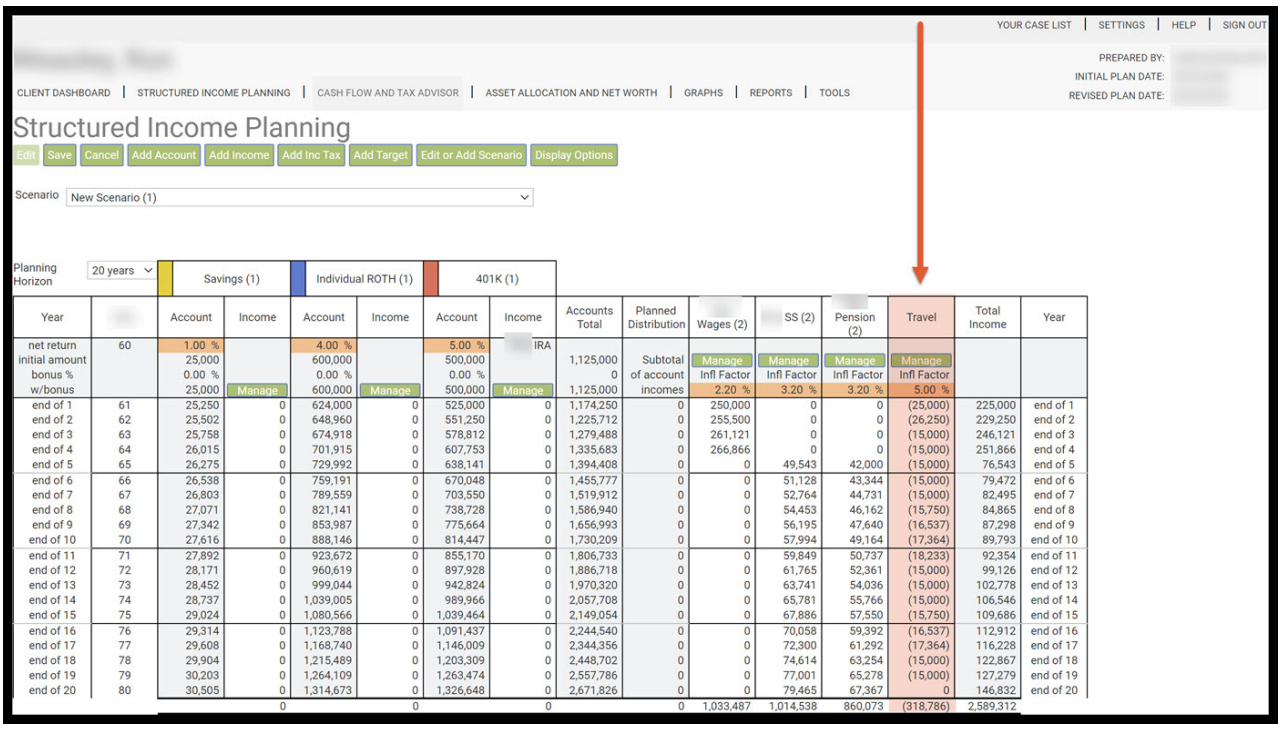


Step 5: Year: Click on the text box of which year the yearly distribution needs to stop by.

Step 6: Pick Years: Click on the green Pick Years Button underneath the Add Adjustment text box.

Step 7: Save: Click on the green Save button underneath the Manage Income subheading.

Step 8: Structured Income Planning Page: The new income should have a separate column in the structured income plan.



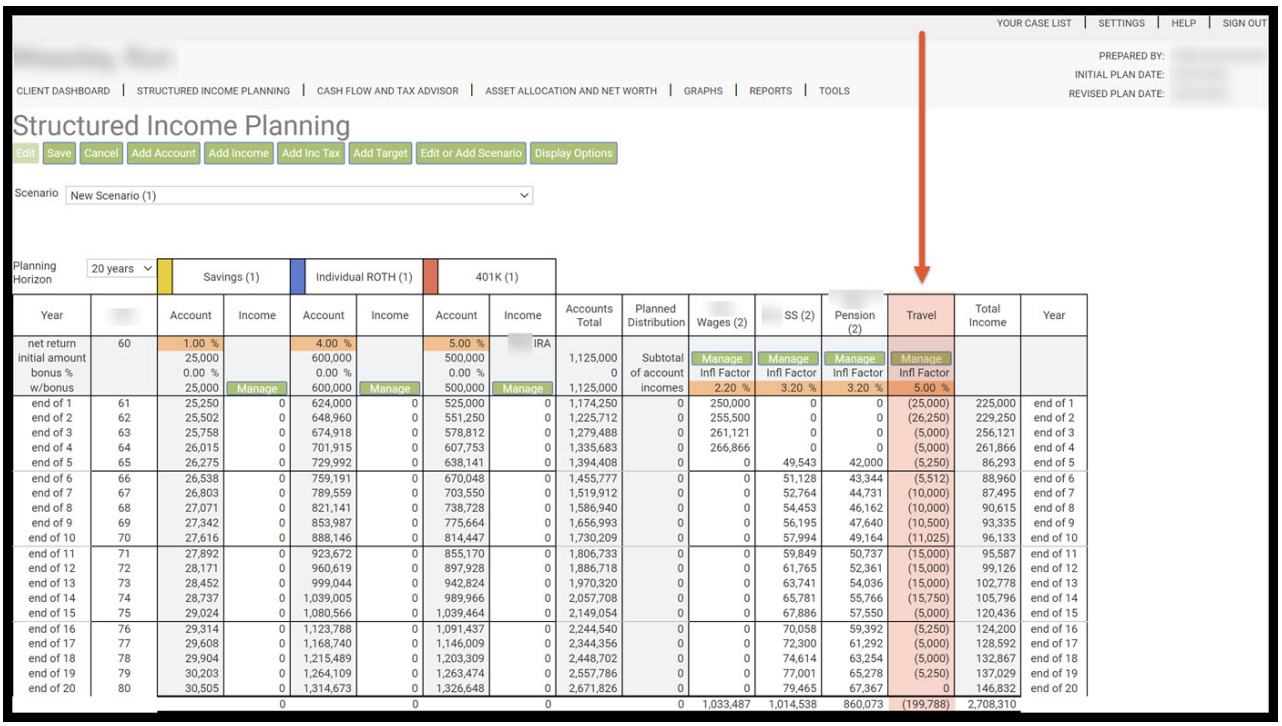
Option B: Pick Year(s) to Remove:

Step 9: Year: Click on the year text box within the income adjustment table of which years you would like to remove.

Step 10: Pick Years to Remove: Click on the green Pick Years to Remove underneath the Add Adjustment text box.

Step 11: Save: Click on the green Save button underneath the Manage Income subheading.

Step 12: Structured Income Planning Page: The new income should have a separate column in the structured income plan.

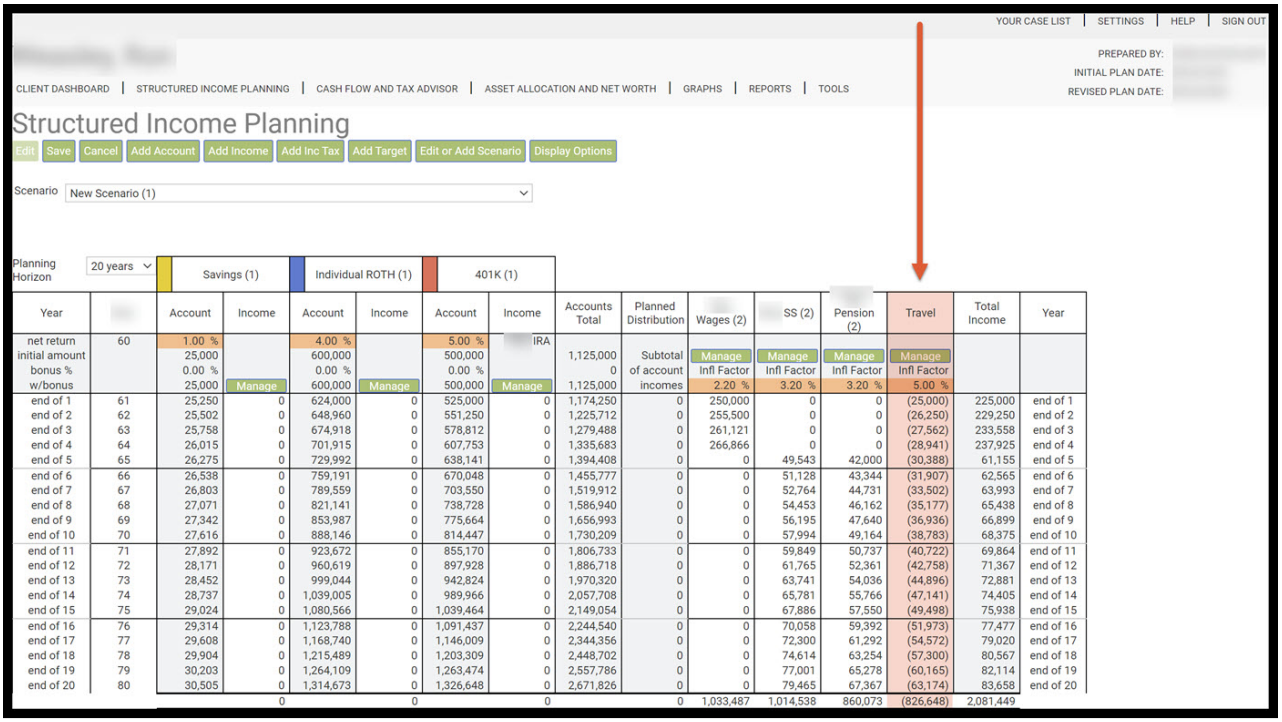


Option C: Reset All Years

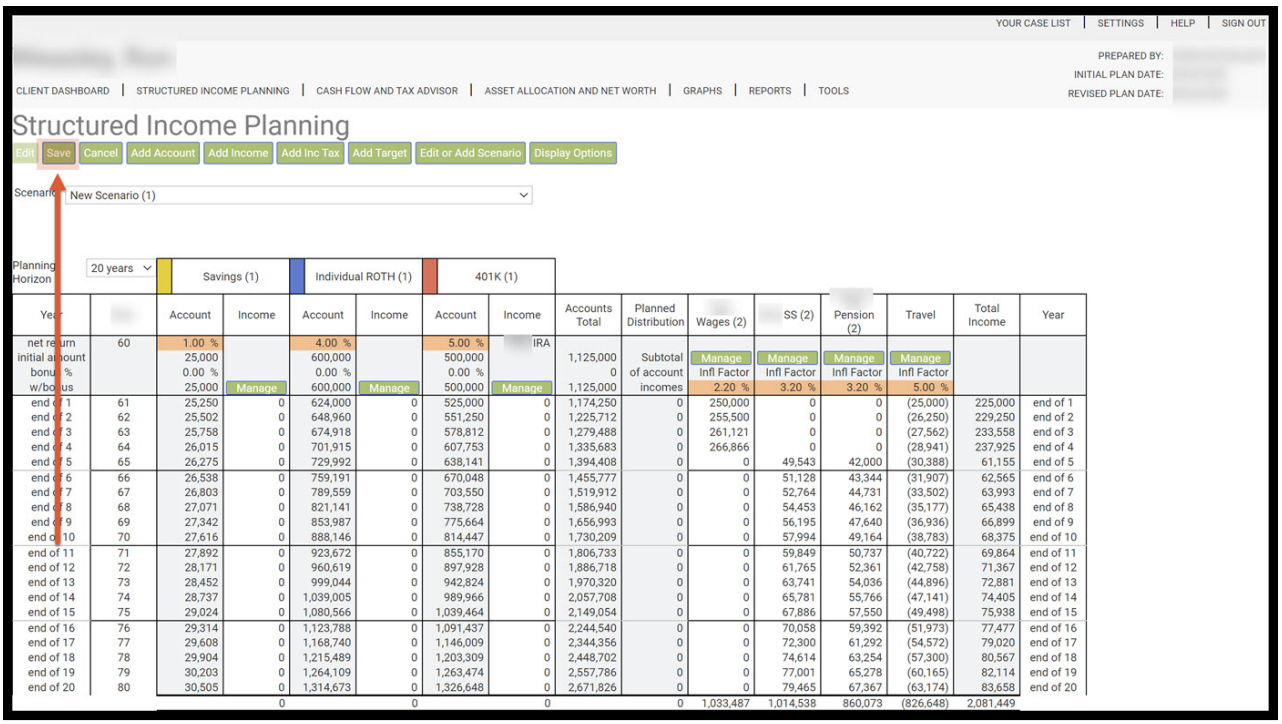
Step 13: Reset All Years: Click on the green reset all years button underneath the add adjustment text box.

Step 14: Save: Click the green save button underneath the Manage Income Subheading.

Step 15: Structured Income Planning Page: The new income should have a separate column in the structured income plan.

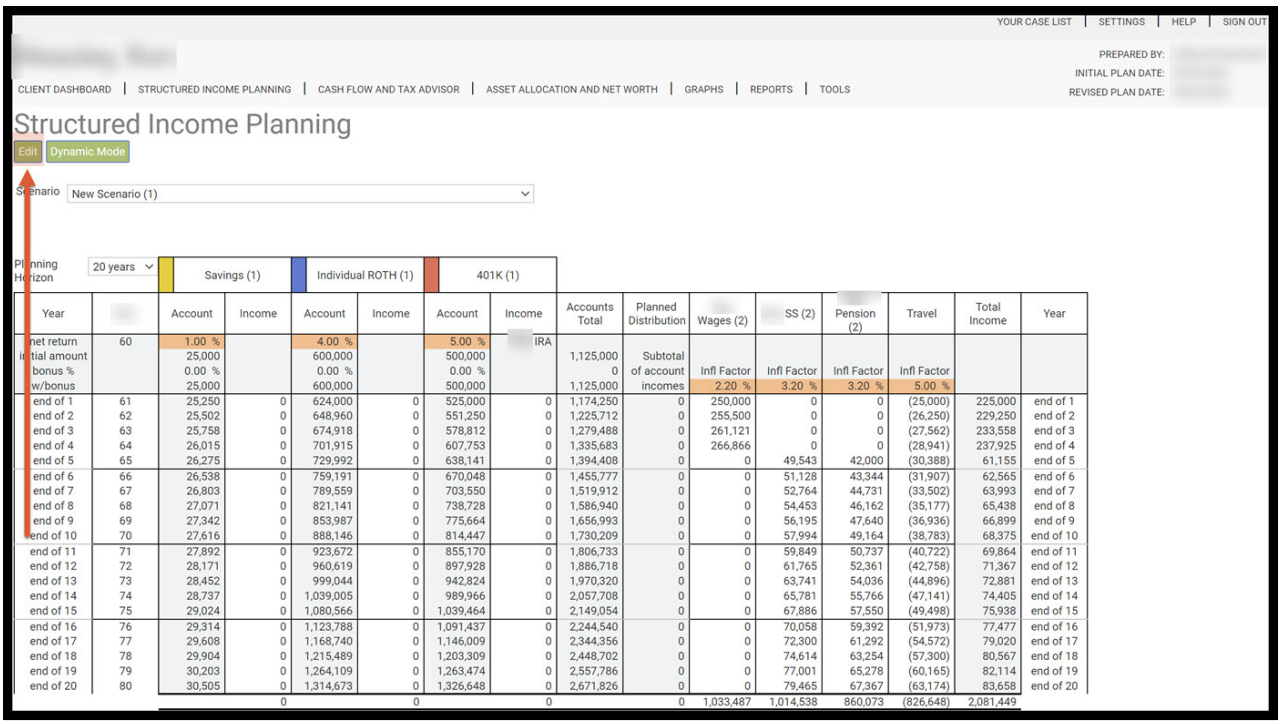


Step 16: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



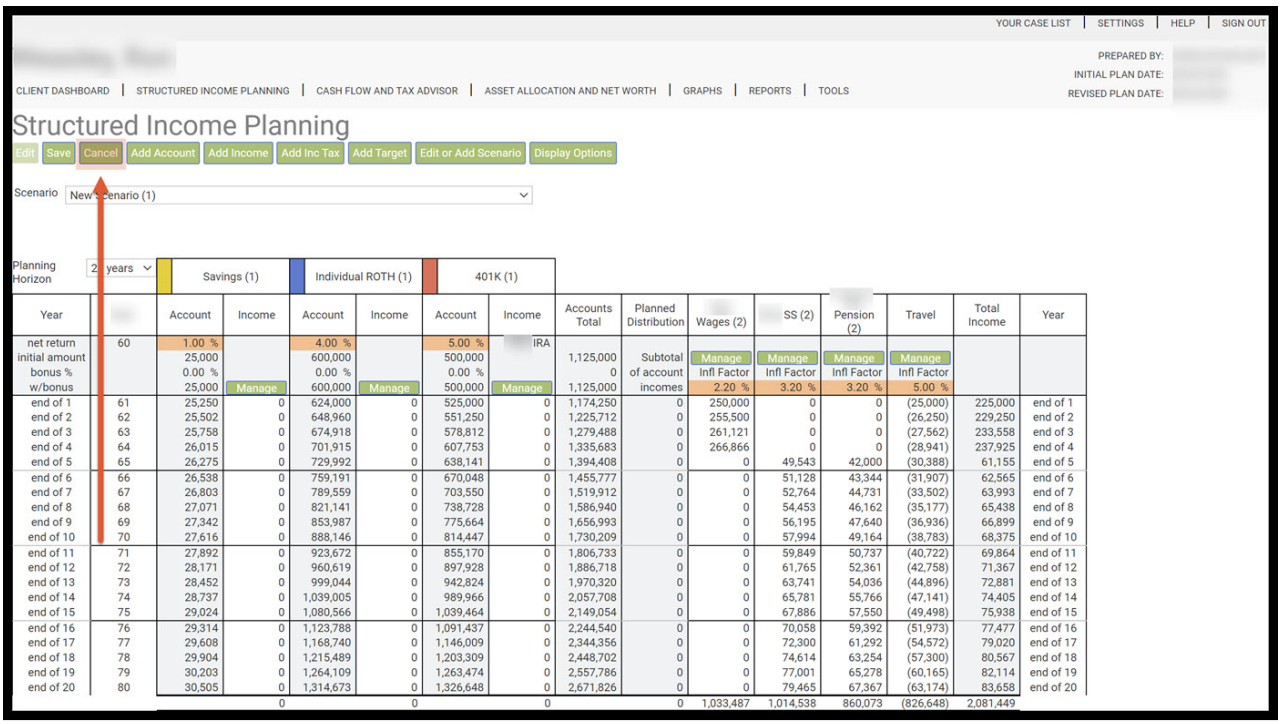
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Travel	Total Income	Year
net return	60	1.00 %		4.00 %		5.00 %	IRA								
initial amount		25,000		600,000		500,000		1,125,000	Subtotal	Manage	Manage	Manage	Manage		
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor		
w/bonus		25,000	Manage	600,000	Manage	500,000	Manage	1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %		
end of 1	61	25,250	0	624,000	0	525,000	0	1,174,250	0	250,000	0	0	(25,000)	225,000	end of 1
end of 2	62	25,502	0	648,960	0	551,250	0	1,225,712	0	255,500	0	0	(26,250)	229,250	end of 2
end of 3	63	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(27,562)	233,558	end of 3
end of 4	64	26,015	0	701,915	0	607,753	0	1,335,683	0	266,866	0	0	(28,941)	237,925	end of 4
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	0	49,543	42,000	(30,388)	61,155	end of 5
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(31,907)	62,565	end of 6
end of 7	67	26,803	0	789,559	0	703,550	0	1,519,912	0	0	52,764	44,731	(33,502)	63,993	end of 7
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(35,177)	65,438	end of 8
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12
end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13
end of 14	74	28,737	0	1,039,005	0	989,966	0	2,057,708	0	0	65,781	55,766	(47,141)	74,405	end of 14
end of 15	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054	0	0	67,886	57,550	(49,498)	75,938	end of 15
end of 16	76	29,314	0	1,123,788	0	1,091,437	0	2,244,540	0	0	70,058	59,392	(51,973)	77,477	end of 16
end of 17	77	29,608	0	1,168,740	0	1,146,009	0	2,344,356	0	0	72,300	61,292	(54,572)	79,020	end of 17
end of 18	78	29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(57,300)	80,567	end of 18
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20
			0		0		0		0	1,033,487	1,014,538	860,073	(826,648)	2,081,449	

Step 17: 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.



Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (2)	SS (2)	Pension (2)	Travel	Total Income	Year
net return	60	1.00 %		4.00 %		5.00 %	IRA								
initial amount		25,000		600,000		500,000		1,125,000	Subtotal						
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor		
w/bonus		25,000		600,000		500,000		1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %		
end of 1	61	25,250	0	624,000	0	525,000	0	1,174,250	0	250,000	0	0	(25,000)	225,000	end of 1
end of 2	62	25,502	0	648,960	0	551,250	0	1,225,712	0	255,500	0	0	(26,250)	229,250	end of 2
end of 3	63	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(27,562)	233,558	end of 3
end of 4	64	26,015	0	701,915	0	607,753	0	1,335,683	0	266,866	0	0	(28,941)	237,925	end of 4
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	0	49,543	42,000	(30,388)	61,155	end of 5
end of 6	66	26,538	0	759,191	0	670,048	0	1,455,777	0	0	51,128	43,344	(31,907)	62,565	end of 6
end of 7	67	26,803	0	789,559	0	703,550	0	1,519,912	0	0	52,764	44,731	(33,502)	63,993	end of 7
end of 8	68	27,071	0	821,141	0	738,728	0	1,586,940	0	0	54,453	46,162	(35,177)	65,438	end of 8
end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12
end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13
end of 14	74	28,737	0	1,039,005	0	989,966	0	2,057,708	0	0	65,781	55,766	(47,141)	74,405	end of 14
end of 15	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054	0	0	67,886	57,550	(49,498)	75,938	end of 15
end of 16	76	29,314	0	1,123,788	0	1,091,437	0	2,244,540	0	0	70,058	59,392	(51,973)	77,477	end of 16
end of 17	77	29,608	0	1,168,740	0	1,146,009	0	2,344,356	0	0	72,300	61,292	(54,572)	79,020	end of 17
end of 18	78	29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(57,300)	80,567	end of 18
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20
			0		0		0		0	1,033,487	1,014,538	860,073	(826,648)	2,081,449	

Step 18: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



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bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor		
w/bonus		25,000	Manage	600,000	Manage	500,000	Manage	1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %		
end of 1	61	25,250	0	624,000	0	525,000	0	1,174,250	0	250,000	0	0	(25,000)	225,000	end of 1
end of 2	62	25,502	0	648,960	0	551,250	0	1,225,712	0	255,500	0	0	(26,250)	229,250	end of 2
end of 3	63	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(27,562)	233,558	end of 3
end of 4	64	26,015	0	701,915	0	607,753	0	1,335,683	0	266,866	0	0	(28,941)	237,925	end of 4
end of 5	65	26,275	0	729,992	0	638,141	0	1,394,408	0	0	49,543	42,000	(30,388)	61,155	end of 5
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end of 9	69	27,342	0	853,987	0	775,664	0	1,656,993	0	0	56,195	47,640	(36,936)	66,899	end of 9
end of 10	70	27,616	0	888,146	0	814,447	0	1,730,209	0	0	57,994	49,164	(38,783)	68,375	end of 10
end of 11	71	27,892	0	923,672	0	855,170	0	1,806,733	0	0	59,849	50,737	(40,722)	69,864	end of 11
end of 12	72	28,171	0	960,619	0	897,928	0	1,886,718	0	0	61,765	52,361	(42,758)	71,367	end of 12
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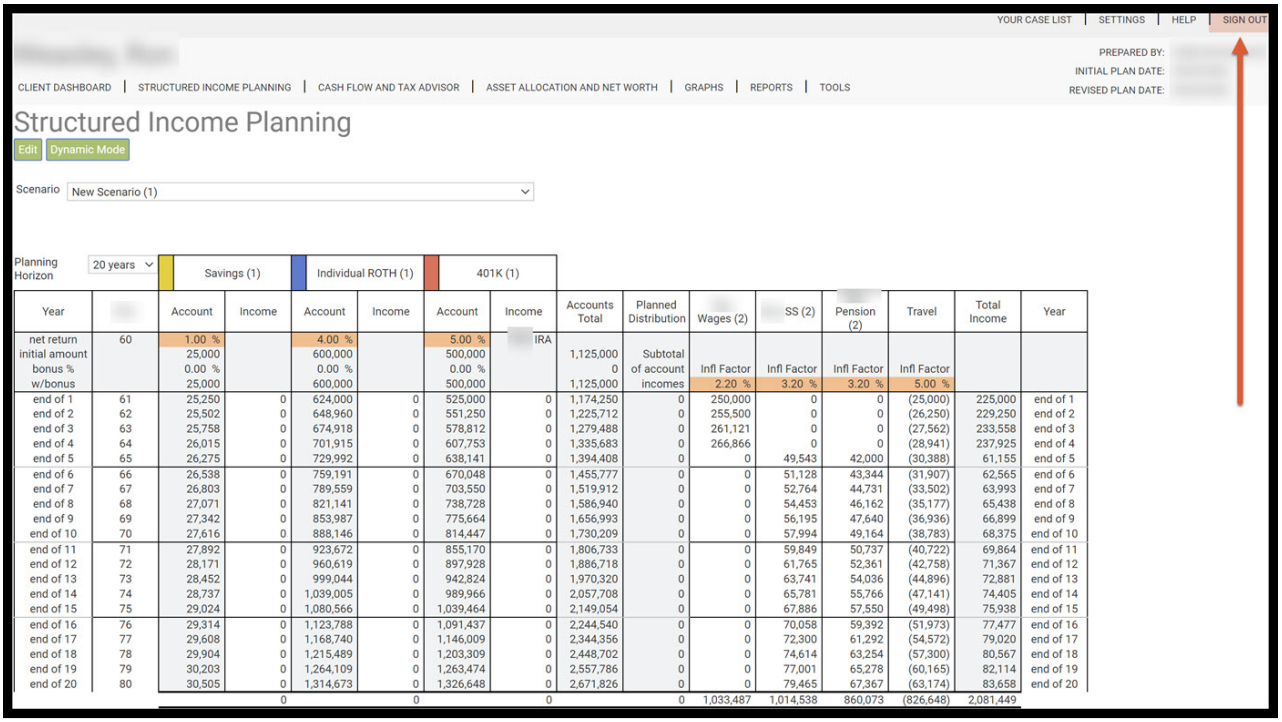
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20
			0		0		0		0	1,033,487	1,014,538	860,073	(826,648)	2,081,449	

Step 19: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor		
w/bonus		25,000		600,000		500,000		1,125,000	incomes	2.20 %	3.20 %	3.20 %	5.00 %		
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end of 2	62	25,502	0	648,960	0	551,250	0	1,225,712	0	255,500	0	0	(26,250)	229,250	end of 2
end of 3	63	25,758	0	674,918	0	578,812	0	1,279,488	0	261,121	0	0	(27,562)	233,558	end of 3
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end of 13	73	28,452	0	999,044	0	942,824	0	1,970,320	0	0	63,741	54,036	(44,896)	72,881	end of 13
end of 14	74	28,737	0	1,039,005	0	989,966	0	2,057,708	0	0	65,781	55,766	(47,141)	74,405	end of 14
end of 15	75	29,024	0	1,080,566	0	1,039,464	0	2,149,054	0	0	67,886	57,550	(49,498)	75,938	end of 15
end of 16	76	29,314	0	1,123,788	0	1,091,437	0	2,244,540	0	0	70,058	59,392	(51,973)	77,477	end of 16
end of 17	77	29,608	0	1,168,740	0	1,146,009	0	2,344,356	0	0	72,300	61,292	(54,572)	79,020	end of 17
end of 18	78	29,904	0	1,215,489	0	1,203,309	0	2,448,702	0	0	74,614	63,254	(57,300)	80,567	end of 18
end of 19	79	30,203	0	1,264,109	0	1,263,474	0	2,557,786	0	0	77,001	65,278	(60,165)	82,114	end of 19
end of 20	80	30,505	0	1,314,673	0	1,326,648	0	2,671,826	0	0	79,465	67,367	(63,174)	83,658	end of 20
			0		0		0		0	1,033,487	1,014,538	860,073	(826,648)	2,081,449	

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.