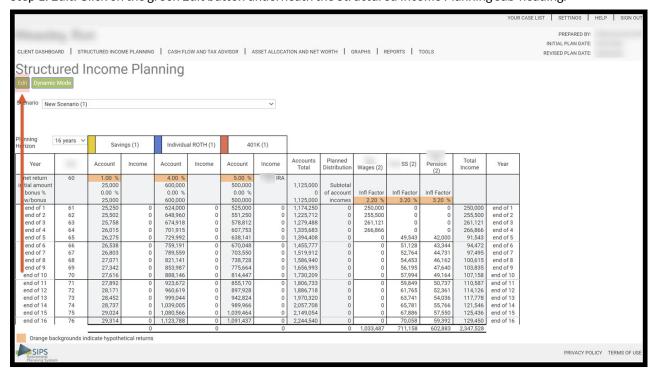
Adding an Income Tax to the Structured Income Plan

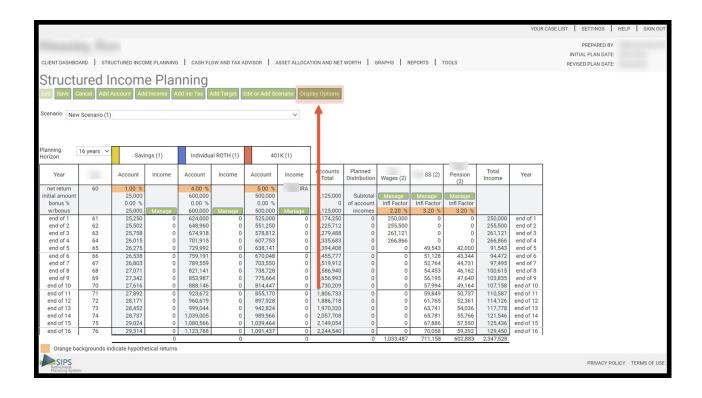
09/17/2024 1:23 pm EDT

The Add Inc Tax button within the structured income plan allows you to add income tax within the structured income plan. Below are the step-by-step guidelines for adding an income tax into the structured income plan.

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



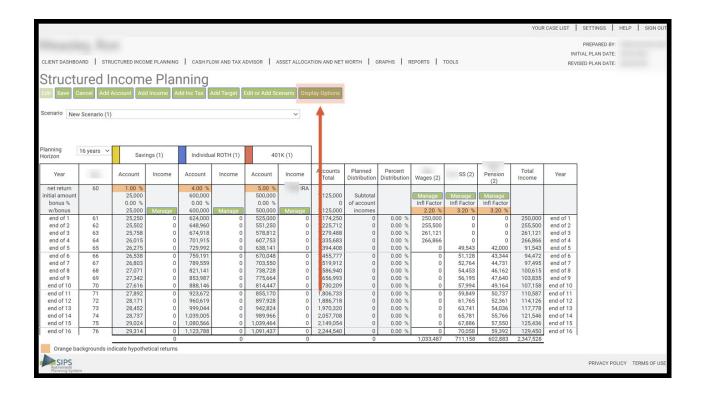
Step 2: Display Options: Click on the green Display Options underneath the Structured Income Planning subheading.



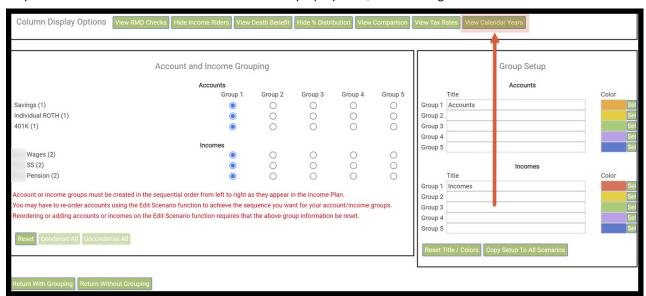
Step 3: View Tax Rate: Within the Column Display Options, click on the green View Tax Rates.



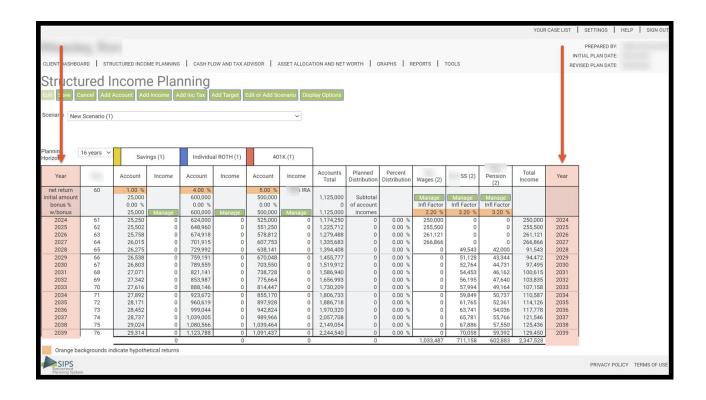
Step 4: Display Options: Click on the green Display Options underneath the Structured Income Planning subheading.



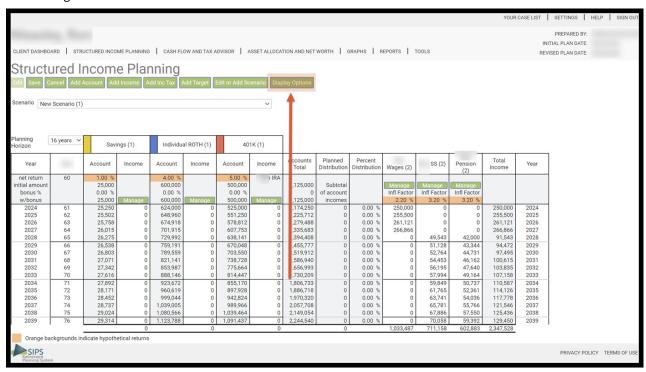
Step 5: View Calendar Years: Within the Column Display Options, click on the green View Calendar Years.



Step 6: Structured Income Planning Page: The Year columns have been switched to calendar years.



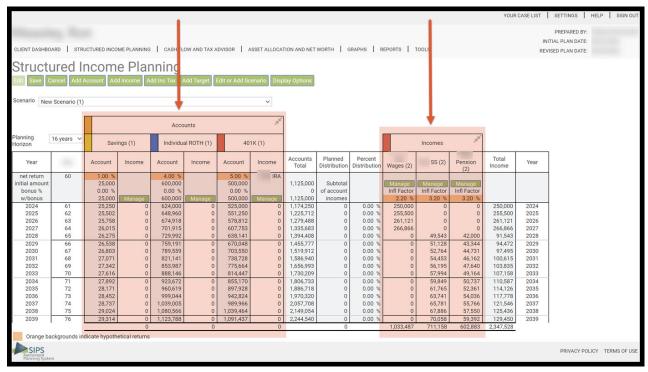
Step 7: Display Options: Click on the green Display Options underneath the Structured Income Planning subheading.



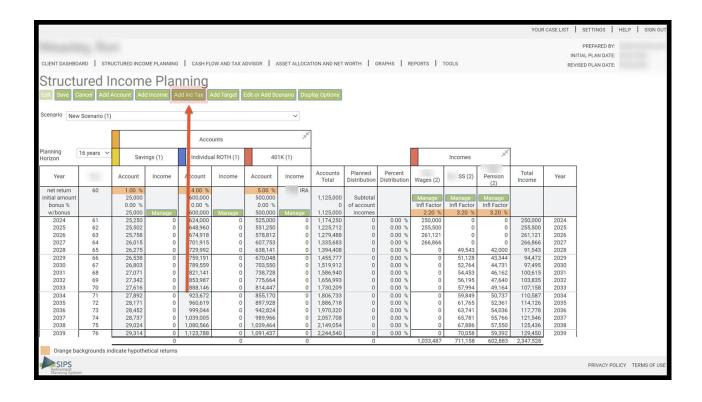
Step 8: Return with Grouping: Click on the Green Return with Group button at the bottom lefthand side of the screen.



Step 9: Structured Income Planning Page: The subgrouping accounts and Incomes have been added to the structured income plan.



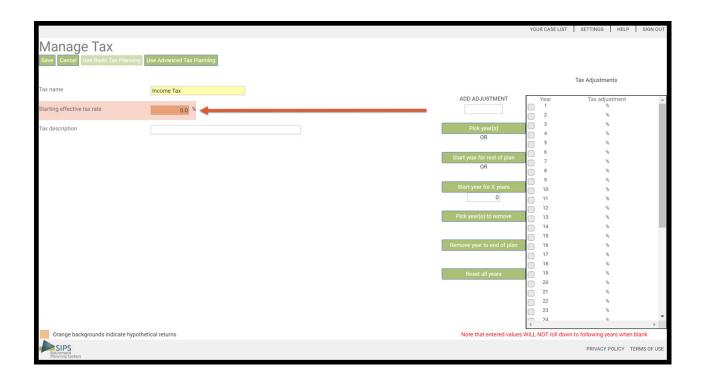
Step 10: Add Inc Tax: Click on the green Add Inc Tax button underneath the Structured Income Planning sub heading.



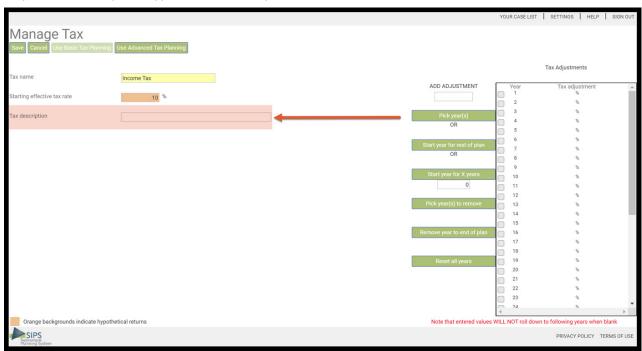
Step 11: Tax Name: Filter in a Tax Name.



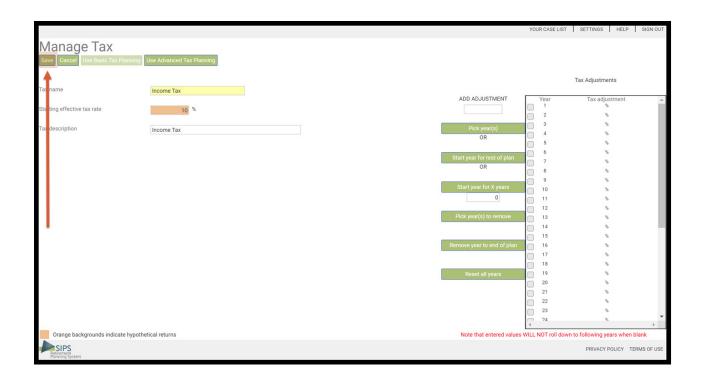
Step 12: Starting Effective Tax Rate: Filter in the numerical amount for the starting effective tax rate.



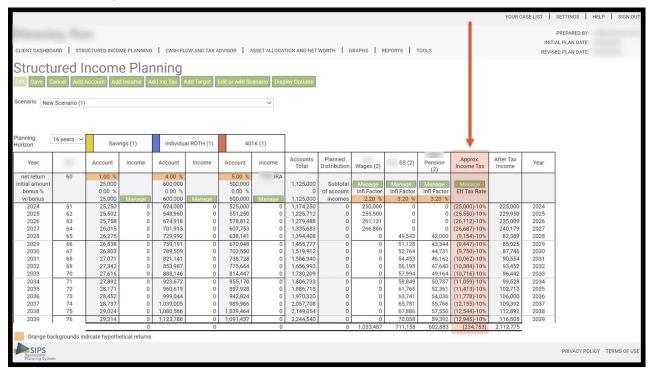
Step 13: Tax Description: Type in a short description.



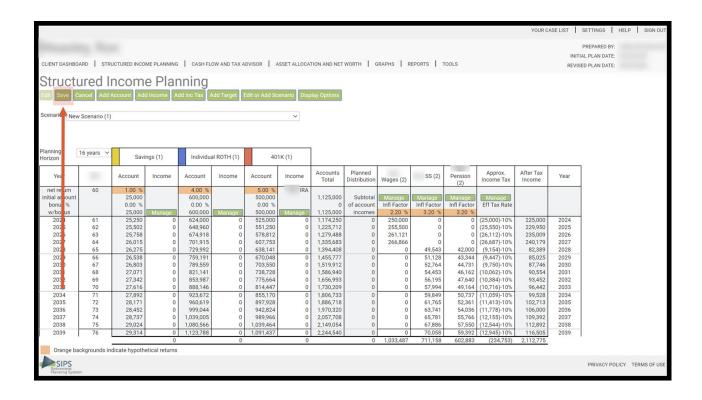
Step 14: Save: Click on the green save button underneath the Manage Tax subheading.



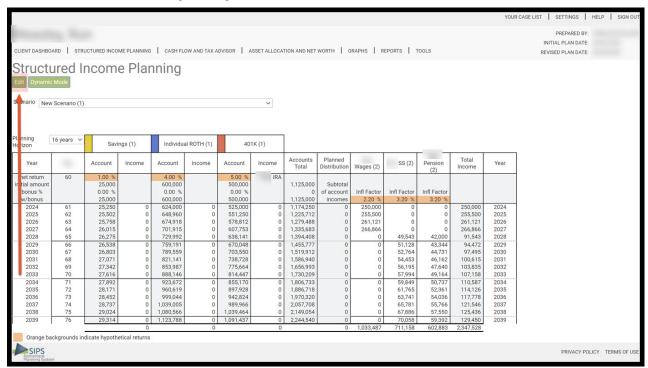
Step 15: Structured Income Planning Page: The new income tax column should have a separate column in the structured income plan.



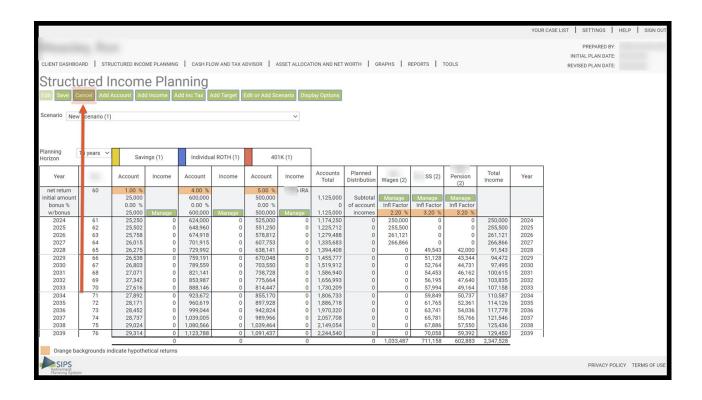
Step 16: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



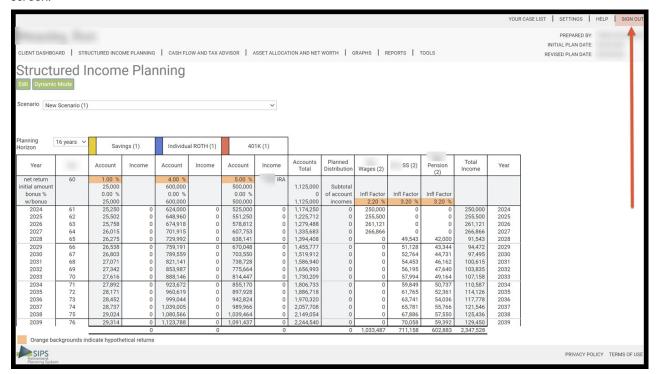
Step 17: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



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.



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.



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.