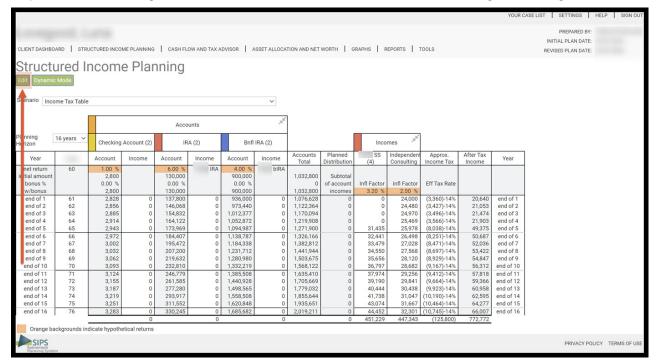
# Editing the Tax Adjustment Table on the Manage Tax Page

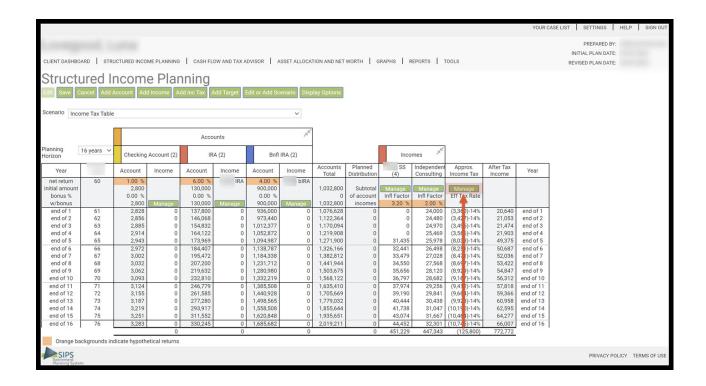
09/17/2024 1:26 pm EDT

On the Manage Tax page there are multiple ways you can edit the income tax amounts. Below are the step-by-step guidelines for the Tax Adjustment Table on the Manage Tax page.

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

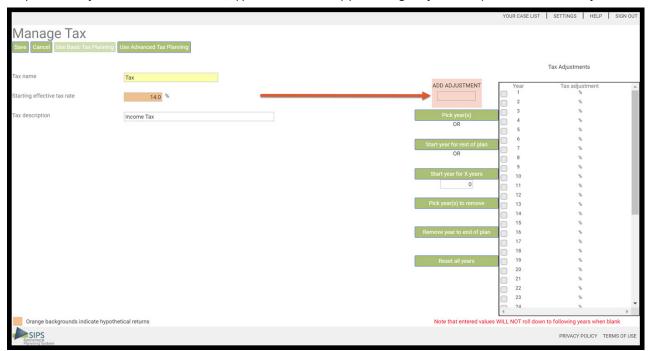


Step 2: Manage: Click on the green Manage button within the Approx. Income Tax column.

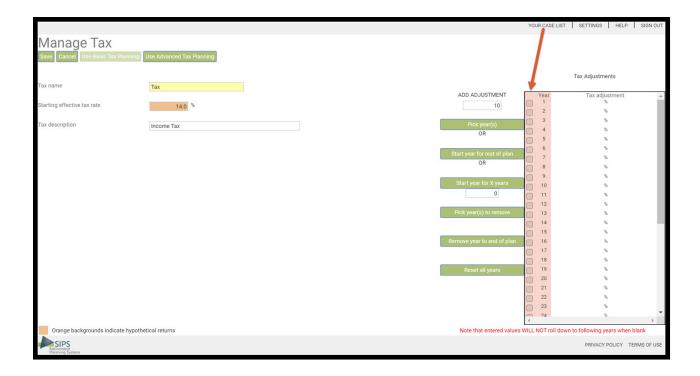


## Option 1: Pick Years:

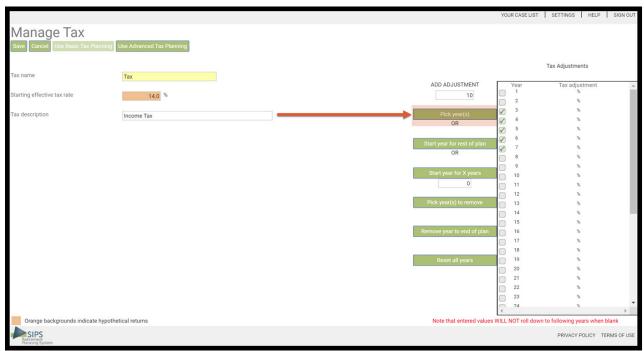
Step 3: Add Adjustment: In the text box, type in the monetary percentage adjustment you would like to adjust.



Step 4: Tax Adjustment Year: Click on the years text box that you would like the tax adjustment be in.



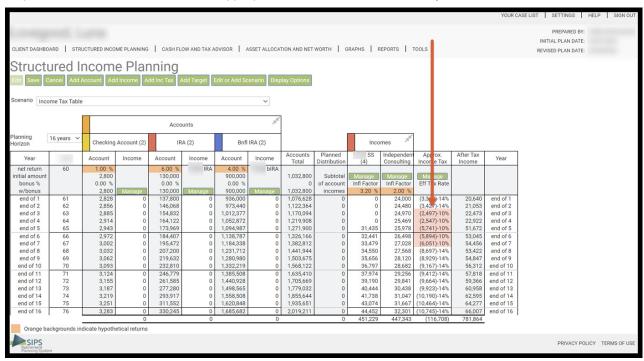
Step 5: Pick Years: Click on the Green Pick Years button next to the Tax Adjustment Table.



Step 6: Save: Click on the Save button underneath the Manage Tax subheading.

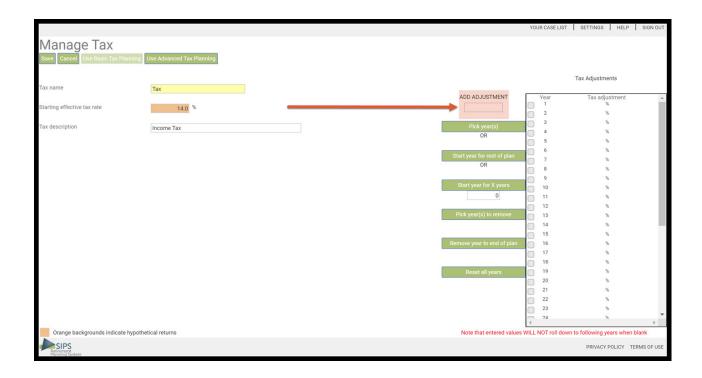


Step 7: Structured Income Plan: In the Appropriate Income Tax column, the adjustment should be reflected.

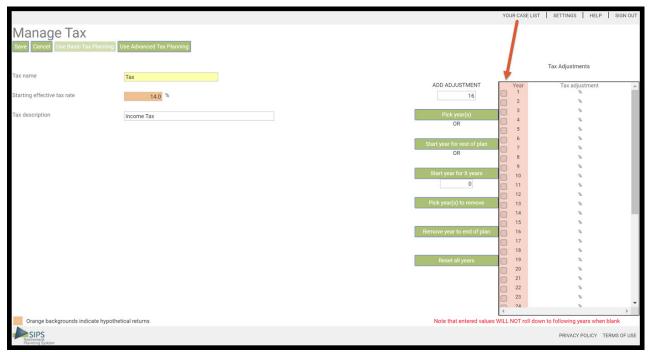


Option 2: Start Year for Rest of Plan:

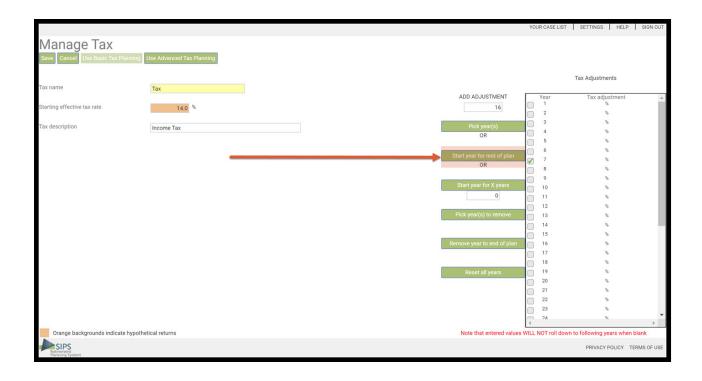
Step 8: Add Adjustment: In the text box, type in the monetary percentage adjustment you would like to adjust.



Step 9: Tax Adjustment Year: Click on the year text box that you would like the tax adjustment to start.



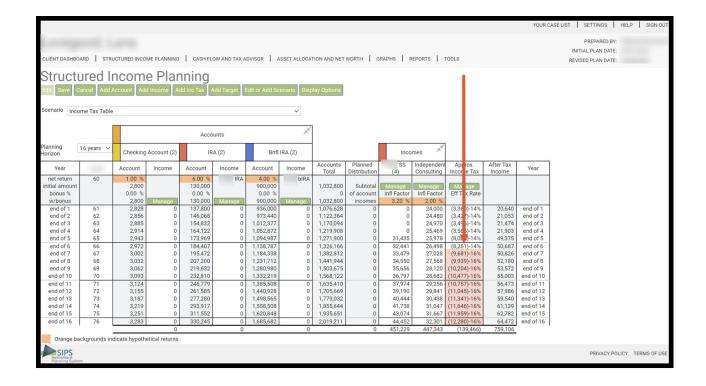
Step 10: Start Year for Rest of Plan: Click on the green Start Year for Rest of Plan button next to the Tax Adjustment table.



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

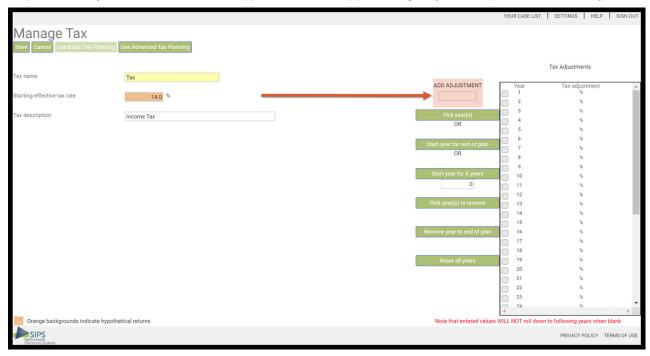


Step 12: Structured Income Plan: In the Appropriate Income Tax column, the adjustment should be reflected.

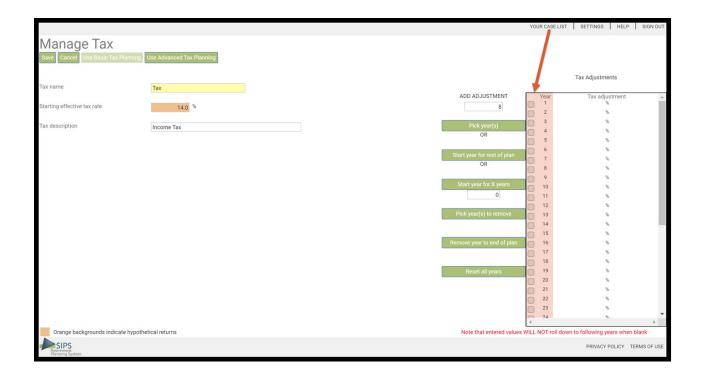


#### Option 3: Start Year for X Years:

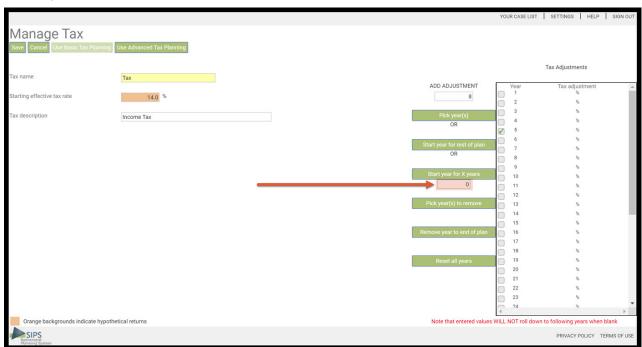
Step 13: Add Adjustment: In the text box, type in the monetary percentage adjustment you would like to adjust.



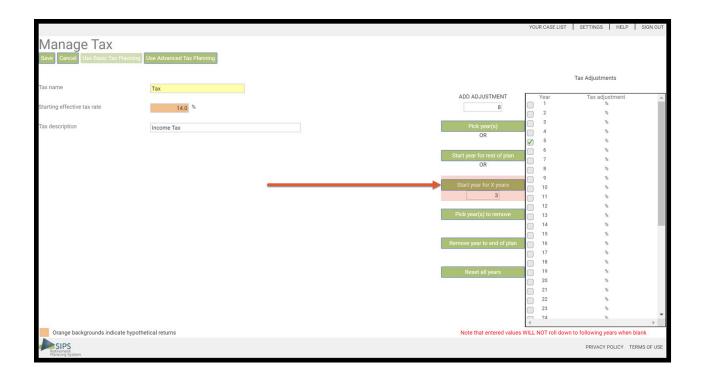
Step 14: Tax Adjustment Year: Click on the year text box that you would like the tax adjustment to start.



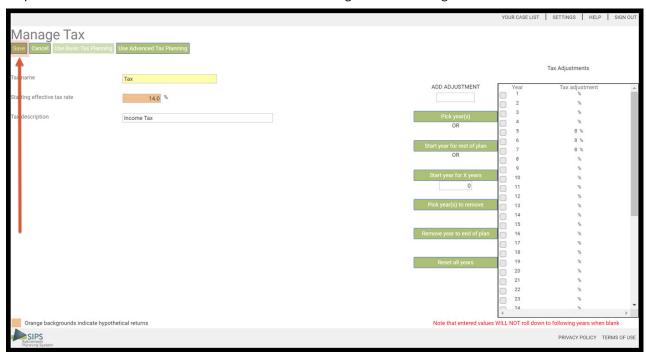
Step 15: Text Box: In the text box underneath the Start Year for X Years button, type in the monetary percentage number you would like to use.



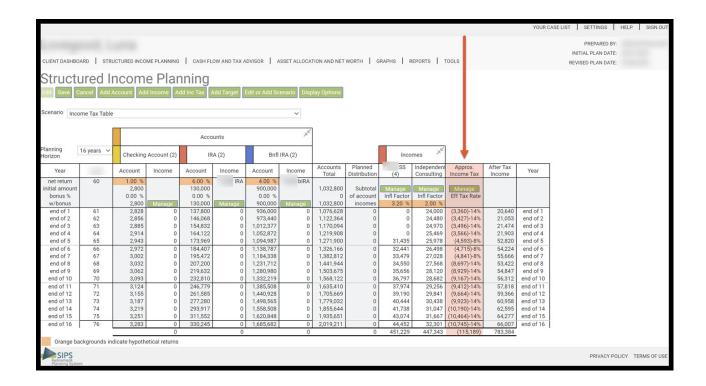
Step 16: Start Year for X Years: Click on the green Start Year for X Years button next to the Tax Adjustment Table.



Step 17: Save: Click on the Save button underneath the Manage Tax subheading.



Step 18: Structured Income Plan: In the Appropriate Income Tax column, the adjustment should be reflected.

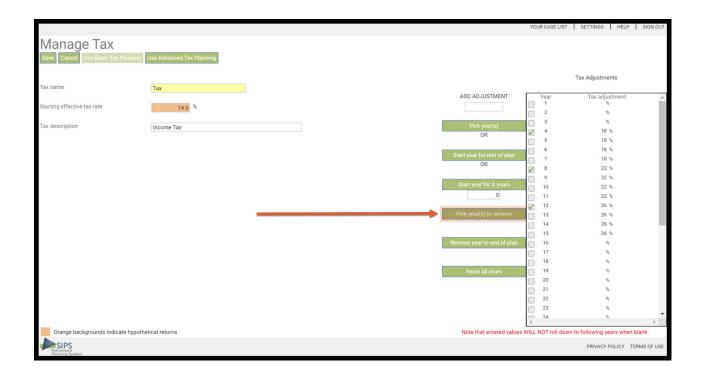


#### Option 4: Pick Years to Remove:

Step 19: Tax Adjustment Year: Click on the year text box that you would like the tax adjustment to be removed from.



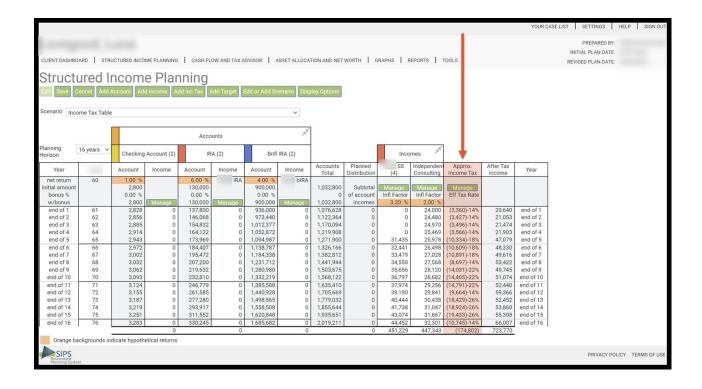
Step 20: Pick Years to Remove: Click on the green Pick Years to Remove button next to the Tax Adjustment table.



Step 21: Save: Click on the Save button underneath the Manage Tax subheading.



Step 22: Structured Income Plan: In the Appropriate Income Tax column, the adjustment should be reflected and go back to the default Income Tax percentage amount.

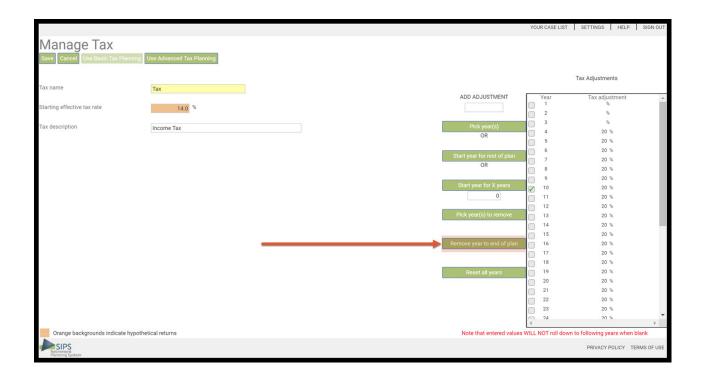


## Option 5: Remove Year to End Plan:

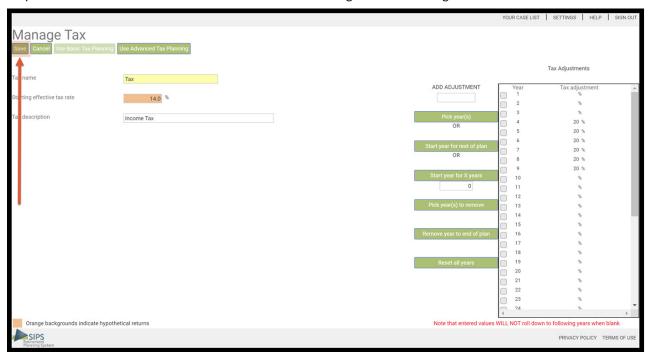
Step 23: Tax Adjustment Year: Click on the year text box that you would like the tax adjustment to be removed from.



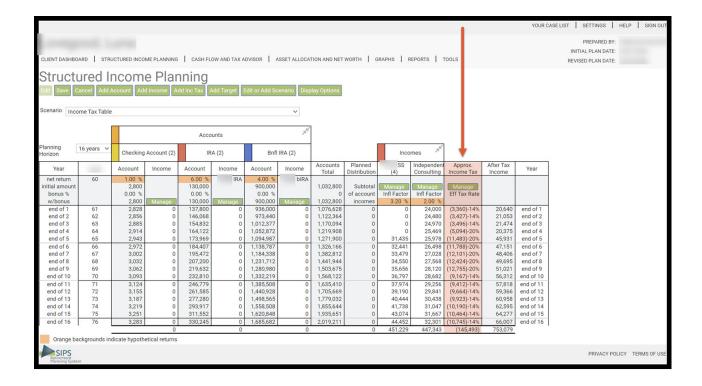
Step 24: Remove Year to End Plan: Click on the green Remove Year to End Plan button next to the Tax Adjustment table.



Step 25: Save: Click on the Save button underneath the Manage Tax subheading.

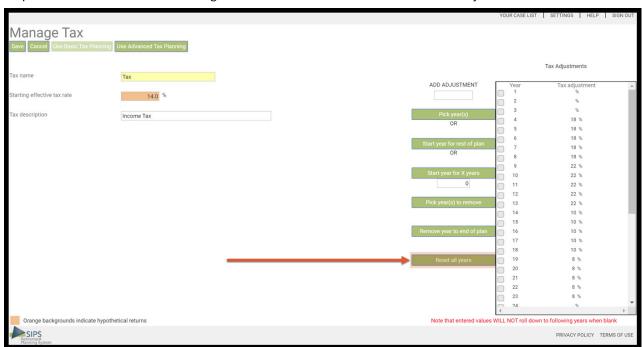


Step 26: Structured Income Plan: In the Appropriate Income Tax column, the adjustment should be reflected and go back to the default Income Tax percentage.



# Option 6: Reset All Years:

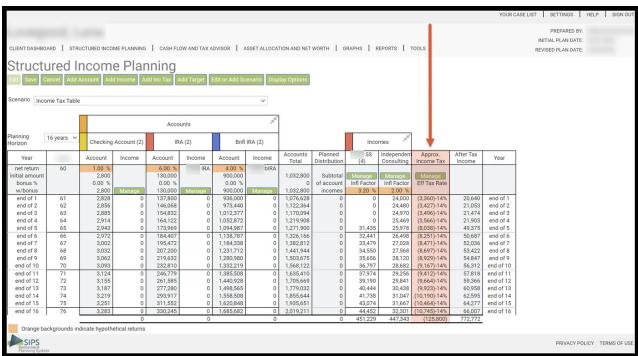
Step 27: Reset All Years: Click on the green button Reset All Years next to the Tax Adjustment Table.



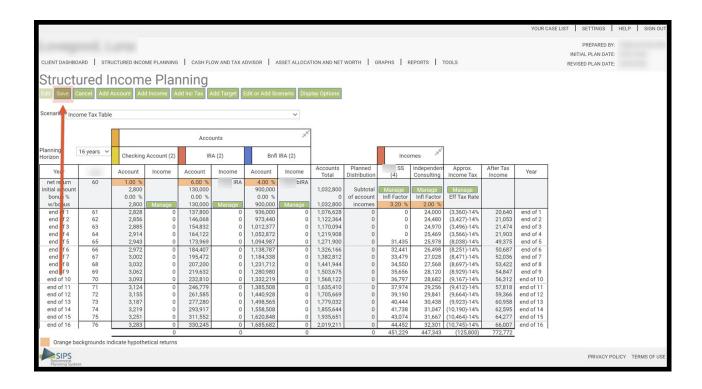
Step 28: Save: Click on the Save button underneath the Manage Tax subheading.



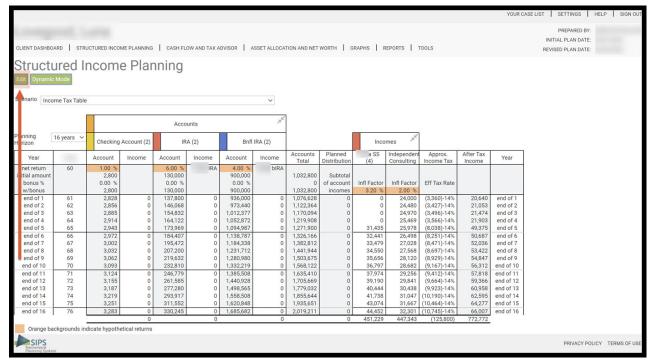
Step 29: Structured Income Plan: In the Appropriate Income Tax column, the adjustment should be reflected and go back to the default Income Tax percentage amount.



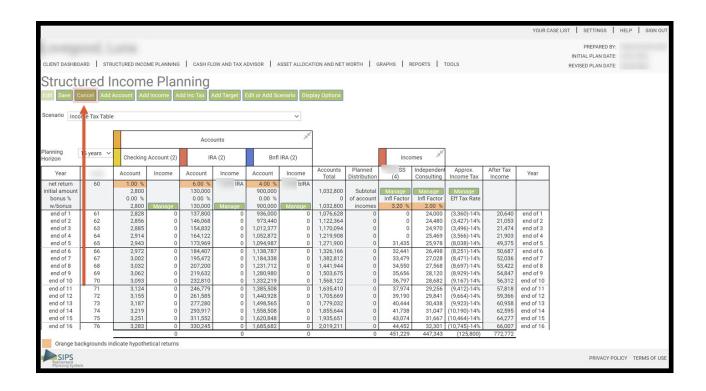
Step 30: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



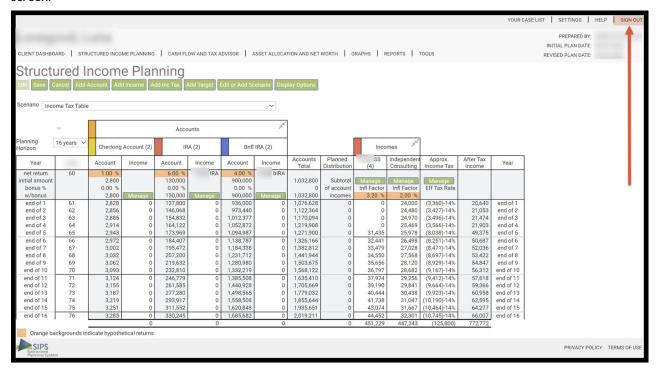
Step 31: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



Step 32: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 33: 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.