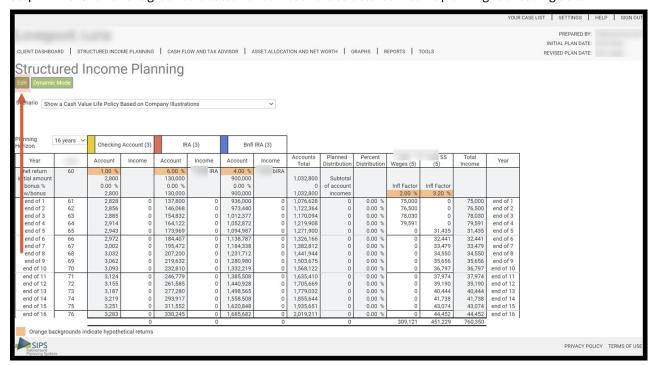
## Showing a Cash Value Life Policy Based on Company Illustrations Function

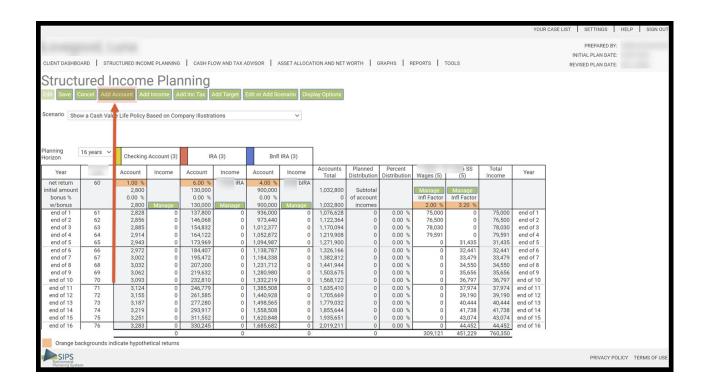
09/20/2024 9:03 am EDT

On the View/Edit Death Benefit page there are unique ways that you can enter in the life insurance policies. Below is the step-by-step guideline for showing the cash value life policy based on company illustrations option.

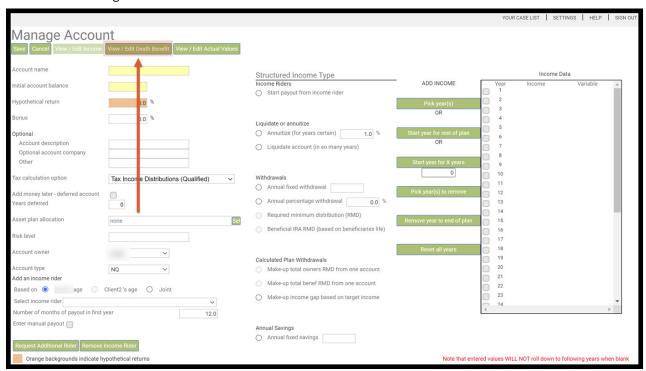
Step 1: Edit: Click on the green edit button underneath the structured income planning subheading title.



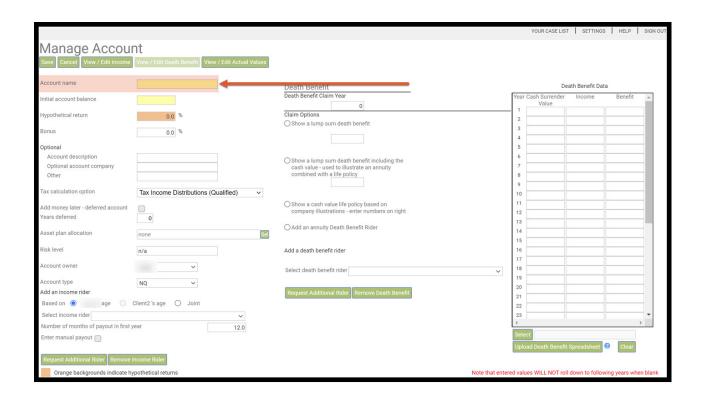
Step 2: Add Account: Click on the green add account button underneath the structured income planning subheading.



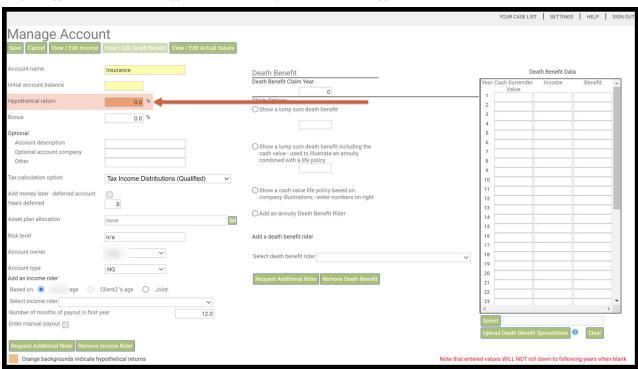
Step 3: View/Edit Death Benefit: Click on the green View/Edit Death Benefit button underneath the Manage Account subheading.



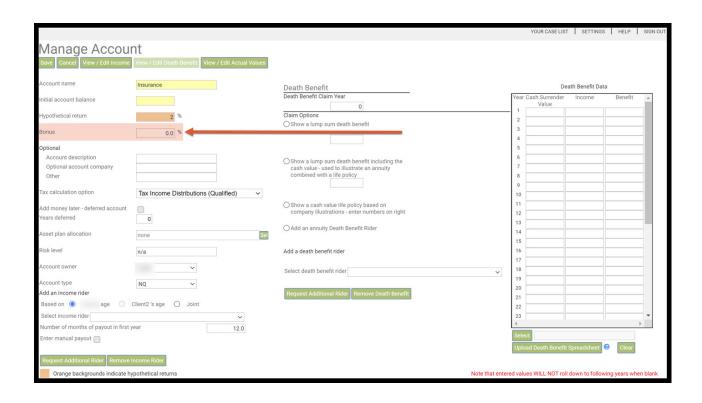
Step 4: Account Name: Type in the account name.



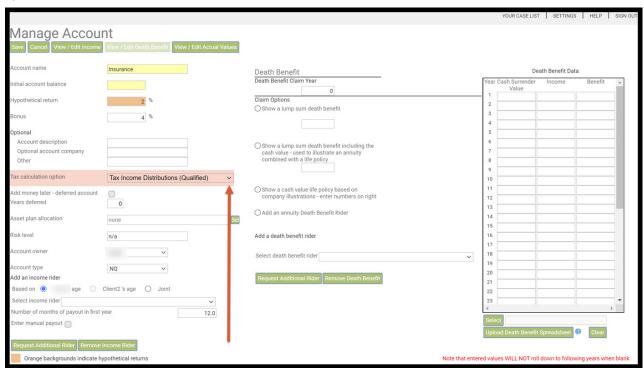
Step 5: Hypothetical Return: Type in the monetary number for the hypothetical return.



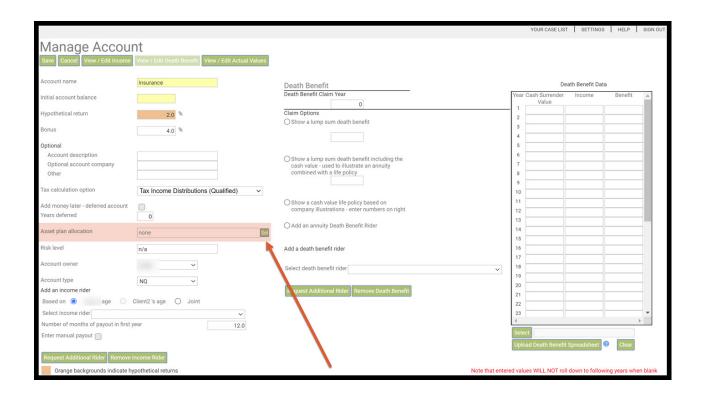
Step 6: Bonus: Type in the monetary number for the bonus.



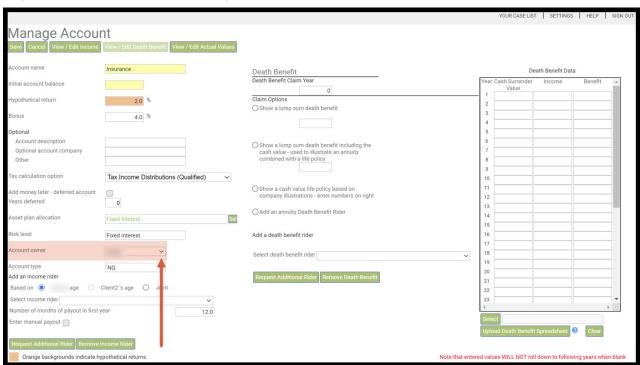
Step 7: Tax Calculation Option: Click on the drop-down carrot arrow in the text box and select the tax calculation option.



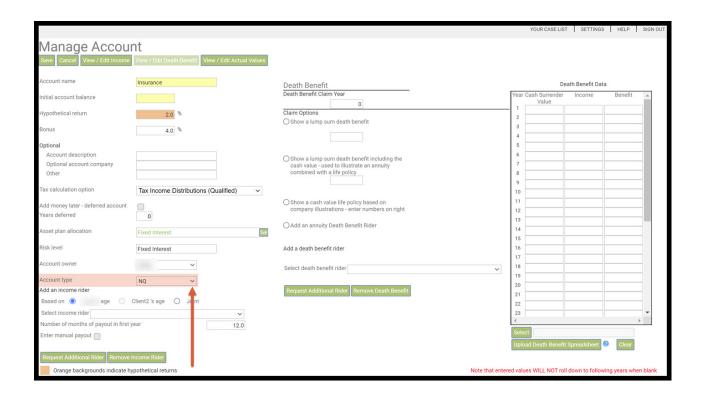
Step 8: Sel: Click on the green Sel button next to the text box for the asset plan allocation and select the asset plan allocation.



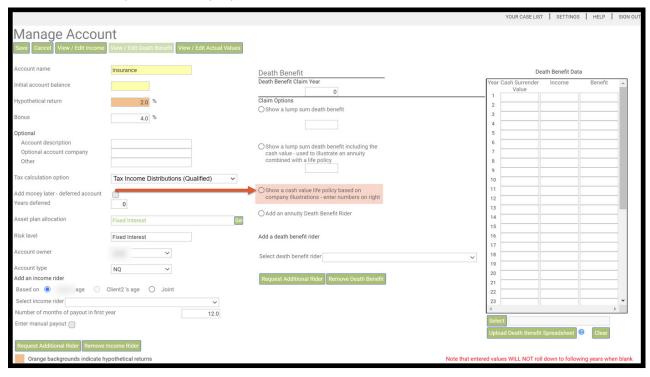
Step 9: Account Owner: Click on the drop-down carrot arrow and select the account owner.



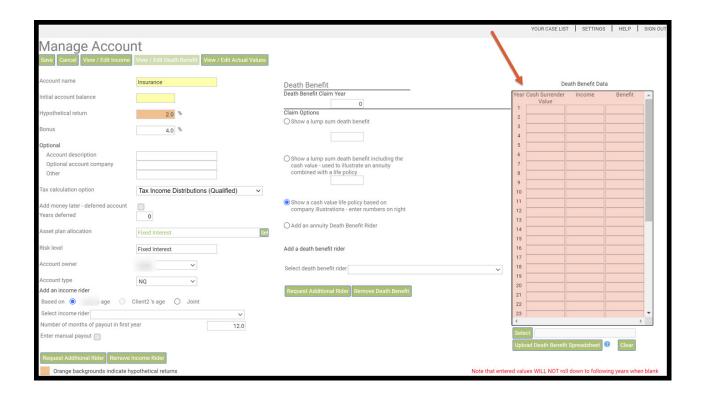
Step 10: Account Type: Click on the drop-down carrot arrow and select account type.



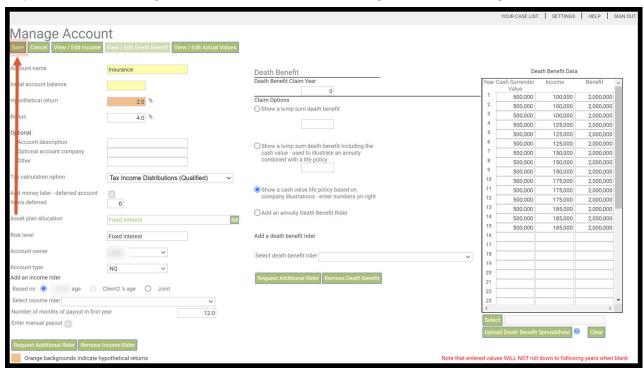
Step 11: Show a Cash Value Life Policy based on company illustrations: Click on the radio button for the Show a Cash Value Life Policy based on company illustrations.



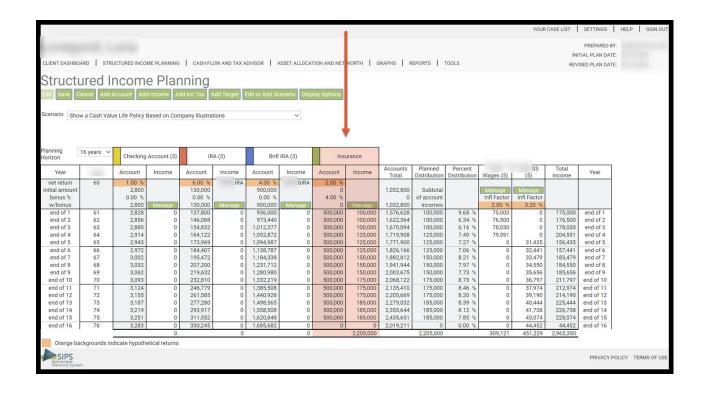
Step 12: Death Benefit Data: Enter the monetary amounts for the cash surrender value, income and benefit into the death benefit data table.



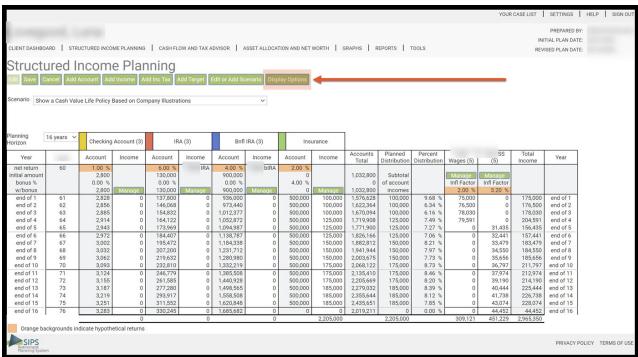
Step 13: Save: Click on the green save button underneath the manage account subheading.



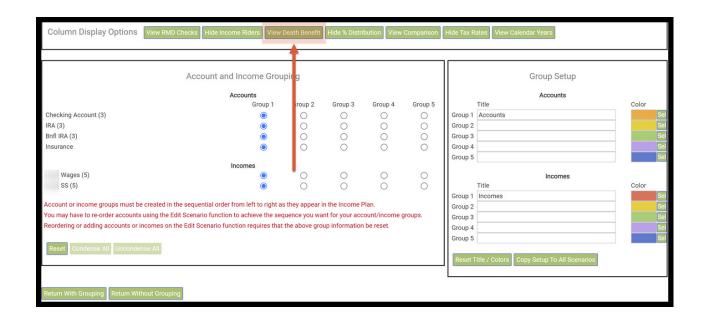
Step 14: Structured Income Plan: A new column should appear in the structured income plan.



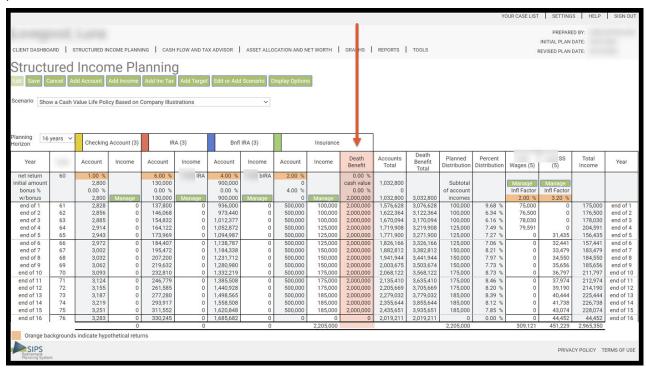
Step 15: Display Options: Click on the green display options subheading underneath the Structured Income Planning heading.



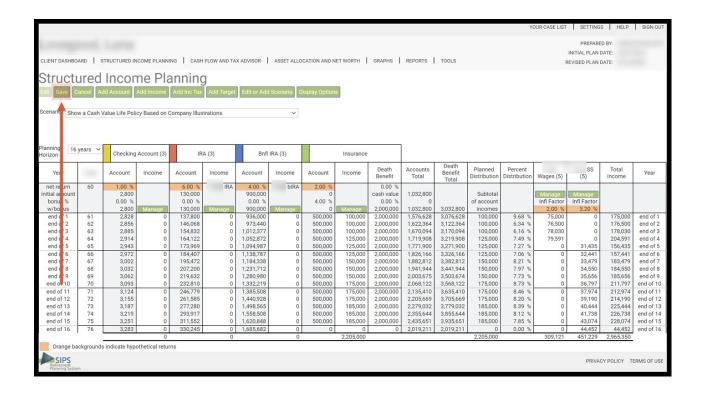
Step 16: Column Display Options: Click on the green View Death Benefit Button in the Column Display Options table.



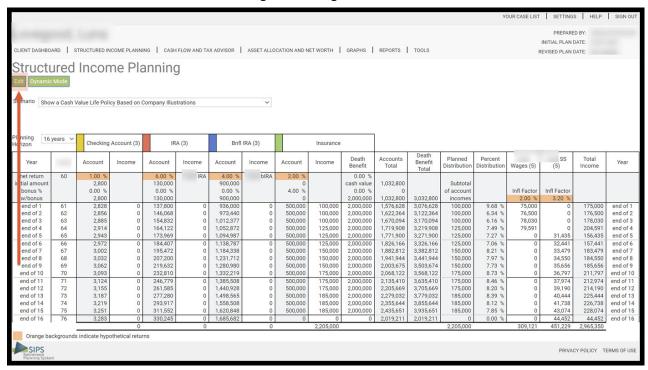
Step 17: Structured Income Plan: A new column should appear under the Life Insurance column displaying the premium.



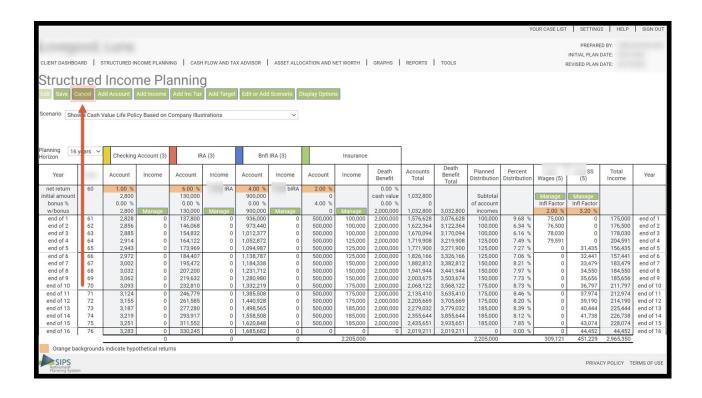
Step 18: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



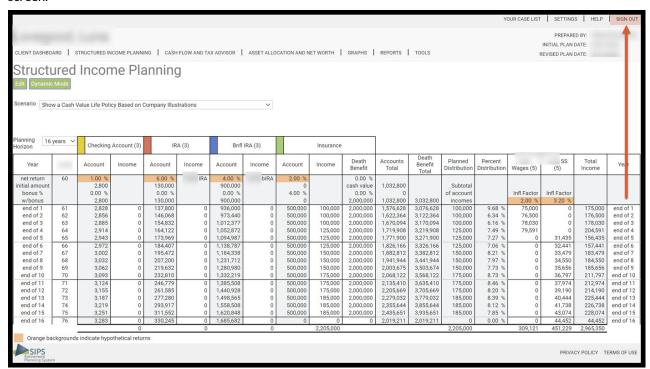
Step 19: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



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.