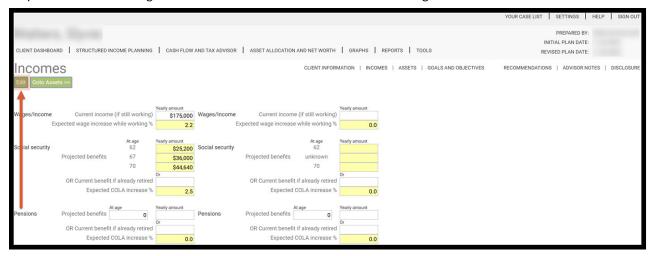
Adding a Pension into the Structured Income Plan to An Existing Plan

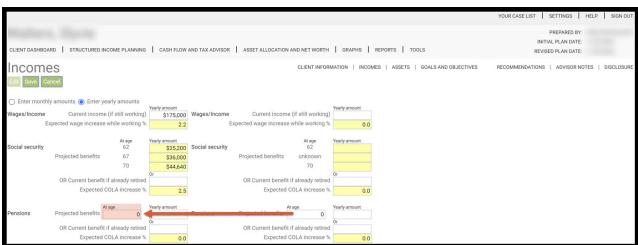
11/27/2024 2:01 pm EST

From the Client Dashboard within the Income page there is a way to add a pension into the structured income plan to an existing plan. Below are the step-by-step guidelines for a pension from the Incomes page.

Step 1: Edit: Click on the green edit button underneath the Incomes heading.



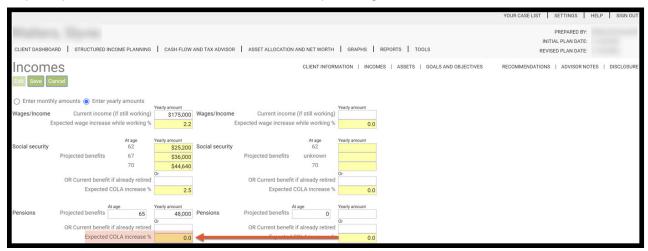
Step 2: At Age Text Box: Enter in the age the projected benefits would start.



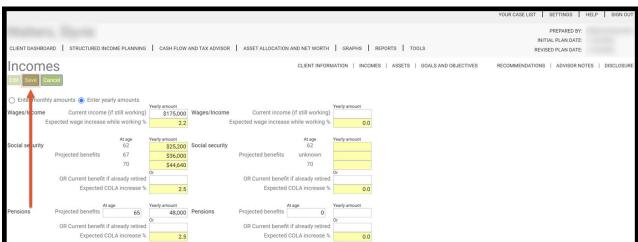
Step 3: Yearly Amount Text Box: Enter in the yearly numeric amount of the pension.

									,	OUR CASE LIST	SETTINGS HELP	SIGN OUT
CLIENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS									PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:			
Incomes CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJECTIVES RECOMMENDATIONS ADVISOR NOTES DISCLOSURE Edit Save Cancel												
Can be an included in the second of the seco												
Wages/Income	e Current income (if		\$175,000	Wages/Income	Current income	(if still working)	really alllount					
2010	Expected wage increase whi	ile working %	2.2	E	xpected wage increase	while working %	0.0					
Social security	Projected benefits	At age 62 67 70	Yearly amount \$25,200 \$36,000 \$44,640	Social security	Projected benefits	At age 62 unknown 70	Yearly amount					
	OR Current benefit if already retired Expected COLA increase %		Or		OR Current benefit	if already retired	Or					
			2.5	Expected COLA increase %								
Pensions	ns Projected benefits At age OR Current benefit if already retired		Yearly amount Or	At age OR Current benefit if already reting the state of		0	Yearly amount Or					
	Expected COL	Expected COLA increase %			Expected COLA increase %		0.0					

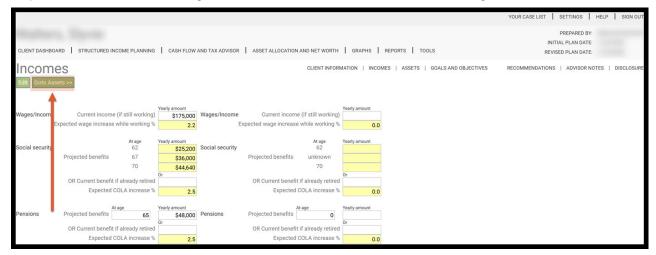
Step 4: Expected COLA Increase %: Enter in the numeric percentage amount.



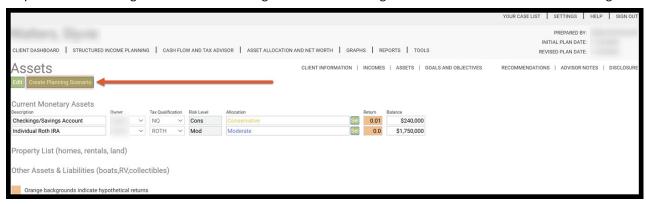
Step 5: Save: Click on the green Save button underneath the Incomes Heading.



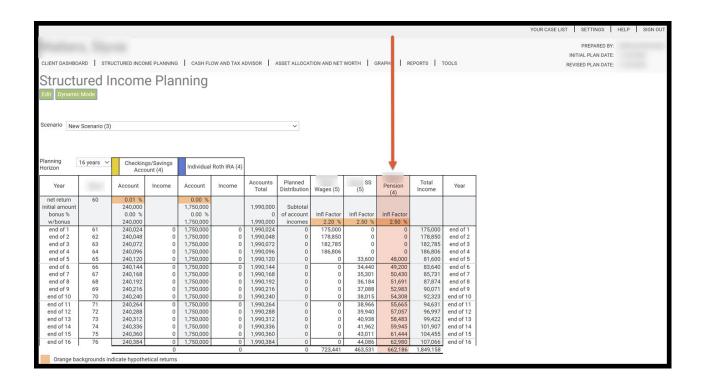
Step 6: GoTo Assets: Click on the green GoTo Assets underneath the Incomes headings.



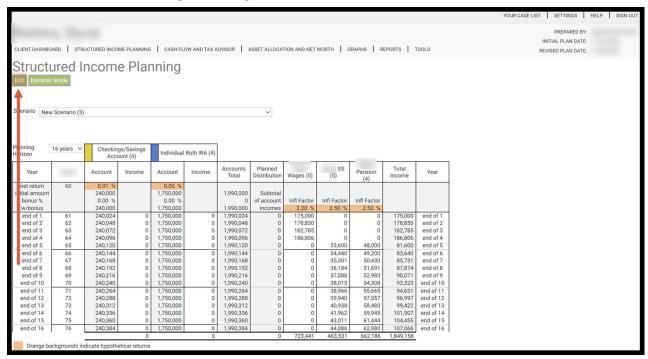
Step 7: Create Planning Scenario: Click on the green Create Planning Scenario underneath the Assets heading.



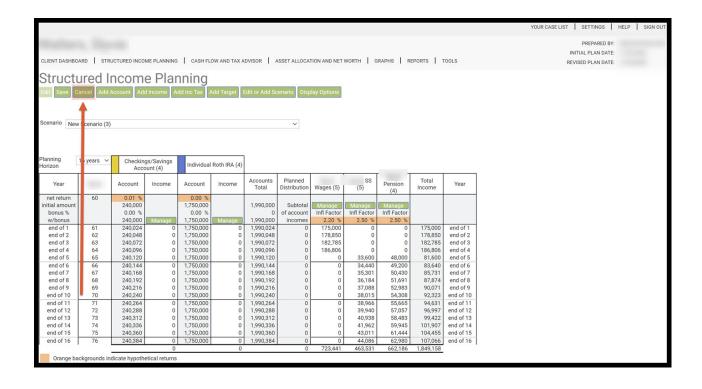
Step 8: Structured Income Planning Page: A new column as automatically appeared in the structured income plan title pension.



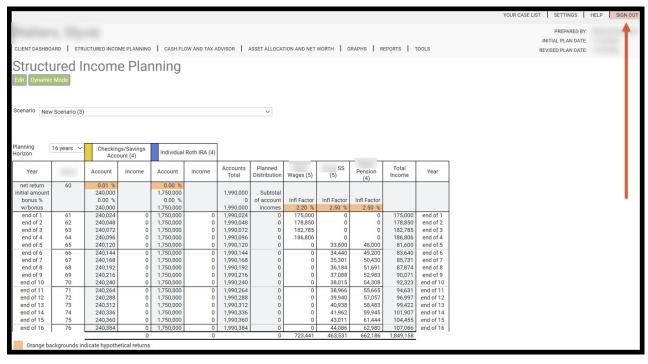
Step 9: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 10: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 11: 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