

Editing the Maximum Percentage Amounts on the Allocation Codes

01/02/2026 9:16 am EST

Underneath the Settings subheading, you'll find the allocation codes. On the allocation codes list page, you can edit the maximum percentage amounts, which are set to 5% by default that is written in code line 10903. Once you update the maximum percentage amount, the allocation code id that you select will automatically adopt the new maximum percentage. Below are examples of updating the maximum percentages for the allocation codes.

Step 1: Log In: Log in into SIPS.



Step 2: Settings: Click on the settings button located on the right-hand side of your screen.



Step 3: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen.

SIPS Powered by PlanScout

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

Save Cancel Select New Logo (*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload

User id
 Old password
 New password
 Please re-enter new password
 Email address

Company Name
 Company Address
 Company Address
 Company Phone
 Company Website
 Company Email

SIPS
Powered by PlanScout

↑

Step 4: Maximum %: Edit the Maximum % amounts.

SIPS Powered by PlanScout

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Sei	0.00	5.00	n/a	0
10904	non Qual	Sei	0.00		n/a	0
10905	Qualified	Sei	0.00		n/a	0
10906	green	Sei	0.00		n/a	0
10907	yellow	Sei	0.00		n/a	0
10908	red	Sei	0.00		n/a	0
10909	safe	Sei	0.00		Fixed Interest	0
10910	risk	Sei	0.00		Aggressive	0
10911	Fixed Interest	Sei	0.00		Fixed Interest	0
10912	Indexed Annuity	Sei	0.00		Indexed Annuity	0
10913	Conservative	Sei	0.00		Conservative	0
10914	Moderately Conservative	Sei	0.00		Moderately Conservative	0
10915	Moderate	Sei	0.00		Moderate	0
10916	Moderately Aggressive	Sei	0.00		Moderately Aggressive	0
10917	Aggressive	Sei	0.00		Aggressive	0

Combining Allocation Codes

You can merge one allocation code into another code by doing the following:

1. Find the id of the code you would like to keep which is located at the left side of the code.
2. Enter this id into the "Replace with id" field of the code you would like to be removed.
3. Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

Del Del Del Del Del Del Del

↓

Step 5: Save: Click the green Save button underneath the Allocation Code List.

SIPS Powered by PlanScout

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Sei	0.00	5.00	n/a	0
10904	non Qual	Sei	0.00	10	n/a	0
10905	Qualified	Sei	0.00	10	n/a	0
10906	green	Sei	0.00	10	n/a	0
10907	yellow	Sei	0.00	10	n/a	0
10908	red	Sei	0.00	10	n/a	0
10909	safe	Sei	0.00	10	Fixed Interest	0
10910	risk	Sei	0.00	10	Aggressive	0
10911	Fixed Interest	Sei	0.00	10	Fixed Interest	0
10912	Indexed Annuity	Sei	0.00	10	Indexed Annuity	0
10913	Conservative	Sei	0.00	10	Conservative	0
10914	Moderately Conservative	Sei	0.00	10	Moderately Conservative	0
10915	Moderate	Sei	0.00	10	Moderate	0
10916	Moderately Aggressive	Sei	0.00	10	Moderately Aggressive	0
10917	Aggressive	Sei	0.00	10	Aggressive	0

Combining Allocation Codes

You can merge one allocation code into another code by doing the following:

1. Find the id of the code you would like to keep which is located at the left side of the code.
2. Enter this id into the "Replace with id" field of the code you would like to be removed.
3. Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

Del Del Del Del Del Del Del

↑

Step 6: Your Case List: Click on the Your Case List button located on the left-hand side of the screen.

SIPS Powered by MetLife

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 08/14/2024
REVISED PLAN DATE: 12/16/2024

CLIENT DASHBOARD | **STRUCTURED INCOME PLANNING** | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Client Information

[Edit](#) [Goto Incomes >>](#)

Case Title: [Redacted]
Description: [Redacted]

Selection tags: [Redacted] Active ☒

Client one: Last [Redacted] First [Redacted] Client two: Last [Redacted] First [Redacted]

Date of birth: [Redacted] Initial plan age: [Redacted] Short name: [Redacted]
Current age: [Redacted] Retirement age: [Redacted] Gender: Female

Initial plan date: [Redacted] Revision date: [Redacted]
Address: [Redacted] City, State, Zip: [Redacted]
Email: [Redacted] Phone: [Redacted] Cell Phone: [Redacted]

List Clients Beneficiaries (optional)

Step 10: Edit: Click on the green Edit button underneath the Structured Income Planning heading.

SIPS

Powered by MetLife

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

PREPARED BY: DEMO ADVISOR

INITIAL PLAN DATE: 08/14/2024

REVISED PLAN DATE: 12/14/2024

CLIENT DASHBOARD

STRUCTURED INCOME PLANNING

CASH FLOW AND TAX ADVISOR

ASSET ALLOCATION AND NET WORTH

GRAPHS

REPORTS

TOOLS

Structured Income Planning

Edit

Dynamic Mode

Scenario

Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon

16 years

		Checking/Savings		Roth IRA		401(k)								
	Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year	
Net return	60	1.00 %		3.00 %		5.00 %		1,605,000						
Initial amount		30,000		75,000		1,500,000		1,605,000						
bonus %		0.00 %		0.00 %		0.00 %								
w/bonus		30,000		75,000		1,500,000								
end of 1	61	30,300	0	77,250	0	1,575,000	0	1,682,550	0	150,000	0	150,000	end of 1	
end of 2	62	30,603	0	79,568	0	1,653,750	0	1,763,920	0	153,000	0	153,000	end of 2	
end of 3	63	30,909	0	81,955	0	1,736,437	0	1,849,301	0	156,060	0	156,060	end of 3	
end of 4	64	31,218	0	84,413	0	1,823,259	0	1,938,890	0	159,181	0	159,181	end of 4	
end of 5	65	31,530	0	86,946	0	1,914,422	0	2,032,898	0	162,365	0	162,365	end of 5	
end of 6	66	31,846	0	89,554	0	2,010,143	0	2,131,542	0	165,612	0	165,612	end of 6	
end of 7	67	32,164	0	92,241	0	2,110,650	0	2,235,054	0	0	41,330	41,330	end of 7	
end of 8	68	32,486	0	95,008	0	2,216,182	0	2,343,676	0	0	42,487	42,487	end of 8	
end of 9	69	32,811	0	97,858	0	2,326,991	0	2,457,660	0	0	43,677	43,677	end of 9	
end of 10	70	33,139	0	100,794	0	2,443,341	0	2,577,273	0	0	44,900	44,900	end of 10	
end of 11	71	33,470	0	103,818	0	2,565,508	0	2,702,795	0	0	46,157	46,157	end of 11	
end of 12	72	33,805	0	106,932	0	2,693,783	0	2,834,520	0	0	47,449	47,449	end of 12	
end of 13	73	34,143	0	110,140	0	2,828,472	0	2,972,755	0	0	48,778	48,778	end of 13	
end of 14	74	34,484	0	113,444	0	2,969,896	0	3,117,824	0	0	50,144	50,144	end of 14	
end of 15	75	34,829	0	116,848	0	3,118,390	0	3,270,067	0	0	51,548	51,548	end of 15	
end of 16	76	35,177	0	120,353	0	3,274,310	0	3,429,840	0	0	52,991	52,991	end of 16	
		0	0	0	0	0	0	0	0	946,218	469,461	1,415,679		

Orange backgrounds indicate hypothetical returns

Step 11: Manage: Click in the green Manage button within the income column of the account.

SIPS YOUR 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: DEMO ADVISOR
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario:

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	1.00 %	3.00 %	IRA	5.00 %		1,605,000		Manage	Manage		
initial amount		30,000	75,000		1,500,000		1,605,000		Manage	Manage		
bonus %		0.00 %	0.00 %		0.00 %				2.00 %	2.80 %		
w/bonus		30,000	75,000		1,500,000		1,605,000					
end of 1	61	30,300	77,250		1,575,000		1,682,550		150,000	0	150,000	end of 1
end of 2	62	30,603	79,568		1,653,750		1,763,920		153,000	0	153,000	end of 2
end of 3	63	30,909	81,955		1,736,437		1,849,301		156,060	0	156,060	end of 3
end of 4	64	31,218	84,413		1,823,259		1,938,890		159,181	0	159,181	end of 4
end of 5	65	31,530	86,946		1,914,422		2,032,898		162,365	0	162,365	end of 5
end of 6	66	31,846	89,554		2,010,143		2,131,542		165,612	0	165,612	end of 6
end of 7	67	32,164	92,241		2,110,650		2,235,054		0	41,330	41,330	end of 7
end of 8	68	32,486	95,008		2,216,182		2,343,676		0	42,487	42,487	end of 8
end of 9	69	32,811	97,858		2,326,991		2,457,560		0	43,677	43,677	end of 9
end of 10	70	33,139	100,794		2,443,341		2,577,273		0	44,900	44,900	end of 10
end of 11	71	33,470	103,818		2,565,508		2,702,795		0	46,157	46,157	end of 11
end of 12	72	33,805	106,932		2,693,783		2,834,520		0	47,449	47,449	end of 12
end of 13	73	34,143	110,140		2,828,472		2,972,755		0	48,778	48,778	end of 13
end of 14	74	34,484	113,444		2,969,896		3,117,824		0	50,144	50,144	end of 14
end of 15	75	34,829	116,848		3,118,390		3,270,067		0	51,548	51,548	end of 15
end of 16	76	35,177	120,353		3,274,310		3,429,840		0	52,991	52,991	end of 16
		0	0		0		0		946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 12: Sel: Click on the green Sel button next to the Asset Plan Allocation text box and select the asset plan Allocation.

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

[Save](#) [Cancel](#) [View / Edit Income](#) [View / Edit Death Benefit](#) [View / Edit Actual Values](#)

Account name: **Roth IRA**

Initial account balance: **\$75,000**

Hypothetical return: **3.0 %**

Bonus: **0.0 %**

Optional

Account description:

Optional account company:

Other:

Tax calculation option: **Tax Income Distributions (Qualified)**

Add money later - deferred account: ☐

Years deferred: **0**

Asset plan allocation: **Moderate - max 10.0%** **Sel**

Risk level: **Moderate**

Account owner:

Account type: **IRA**

Add an income rider

Based on: ☒ age ☐ Client2's age ☐ Joint

Select income rider:

Number of months of payout in first year: **12.0**

Enter manual payout: ☐

[Request Additional Rider](#) [Remove Income Rider](#)

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) **1.0 %**

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal **0.0 %**

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

Pick year(s)

OR

Start year for rest of plan

OR

Start year for X years

0

Pick year(s) to remove

Remove year to end of plan

Reset all years

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Orange backgrounds indicate hypothetical returns

Note that entered values WILL NOT roll down to following years when blank

Step 13: Asset Plan Allocation Code: The text box should display the allocation code and the Maximum % limit.

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

[Save](#) [Cancel](#) [View / Edit Income](#) [View / Edit Death Benefit](#) [View / Edit Actual Values](#)

Account name: **Roth IRA**

Initial account balance: **\$75,000**

Hypothetical return: **3.0 %**

Bonus: **0.0 %**

Optional:

Account description:

Optional account company:

Other:

Tax calculation option: **Tax Income Distributions (Qualified)**

Add money later - deferred account: ☐

Years deferred: **0**

Asset plan allocation: **Moderate - max 10.0%**

Risk level: **none**

Account owner: **non Qual - max 10.0%**

Account type: **Qualified - max 10.0%**

Add an income rider: **green - max 10.0%**

Based on: ☒ age ☐ Client2's age ☐ Joint

Select income rider: **yellow - max 10.0%**

Number of months of payout in first year: **12.0**

Enter manual payout: ☐

[Request Additional Rider](#) [Remove Income Rider](#)

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) **1.0 %**

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal **0.0 %**

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

[Pick year\(s\)](#)

OR

[Start year for rest of plan](#)

OR

[Start year for X years](#)

[Pick year\(s\) to remove](#)

[Remove year to end of plan](#)

[Reset all years](#)

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

Step 14: Save: Click on the green save button underneath the manage account heading.

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Manage Account

[Save](#) [Cancel](#) [View / Edit Income](#) [View / Edit Death Benefit](#) [View / Edit Actual Values](#)

Account name: **Roth IRA**

Initial account balance: **\$75,000**

Hypothetical return: **3.0 %**

Bonus: **0.0 %**

Optional:

Account description:

Optional account company:

Other:

Tax calculation option: **Tax Income Distributions (Qualified)**

Add money later - deferred account: ☐

Years deferred: **0**

Asset plan allocation: **Moderate - max 10.0%**

Risk level: **Moderate**

Account owner: **non Qual - max 10.0%**

Account type: **Qualified - max 10.0%**

Add an income rider: **green - max 10.0%**

Based on: ☒ age ☐ Client2's age ☐ Joint

Select income rider: **yellow - max 10.0%**

Number of months of payout in first year: **12.0**

Enter manual payout: ☐

[Request Additional Rider](#) [Remove Income Rider](#)

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

☐ Start payout from income rider

Liquidate or annuitize

☐ Annuitize (for years certain) **1.0 %**

☐ Liquidate account (in so many years)

Withdrawals

☐ Annual fixed withdrawal

☐ Annual percentage withdrawal **0.0 %**

☐ Required minimum distribution (RMD)

☐ Beneficial IRA RMD (based on beneficiaries life)

Calculated Plan Withdrawals

☐ Make-up total owners RMD from one account

☐ Make-up total benef RMD from one account

☐ Make-up income gap based on target income

Annual Savings

☐ Annual fixed savings

ADD INCOME

[Pick year\(s\)](#)

OR

[Start year for rest of plan](#)

OR

[Start year for X years](#)

[Pick year\(s\) to remove](#)

[Remove year to end of plan](#)

[Reset all years](#)

Income Data

Year	Income	Variable
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		

Note that entered values WILL NOT roll down to following years when blank

Step 15: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.

SIPS YOUR 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: DEMO ADVISOR
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

[Edit](#) [Save](#) [Cancel](#) [Add Account](#) [Add Income](#) [Add Inc Tax](#) [Add Target](#) [Edit or Add Scenario](#) [Display Options](#)

Scenario: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	1.00 %	3.00 %	5.00 %			1,605,000					
initial amount		30,000	75,000	1,500,000			1,605,000					
bonus %		0.00 %	0.00 %	0.00 %			0					
w/bonus		30,000	75,000	1,500,000			1,605,000					
end of 1	61	30,300	77,250	1,575,000			1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	79,568	1,653,750			1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	81,955	1,736,437			1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	84,413	1,823,259			1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	86,946	1,914,422			2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	89,554	2,010,143			2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	92,241	2,110,650			2,235,054	0	41,330	41,330	41,330	end of 7
end of 8	68	32,486	95,008	2,216,182			2,343,676	0	42,487	42,487	42,487	end of 8
end of 9	69	32,811	97,858	2,326,991			2,457,660	0	43,677	43,677	43,677	end of 9
end of 10	70	33,139	100,794	2,443,341			2,577,273	0	44,900	44,900	44,900	end of 10
end of 11	71	33,470	103,818	2,565,508			2,702,795	0	46,157	46,157	46,157	end of 11
end of 12	72	33,805	106,932	2,693,783			2,834,520	0	47,449	47,449	47,449	end of 12
end of 13	73	34,143	110,140	2,828,472			2,972,755	0	48,778	48,778	48,778	end of 13
end of 14	74	34,484	113,444	2,969,896			3,117,824	0	50,144	50,144	50,144	end of 14
end of 15	75	34,829	116,848	3,118,390			3,270,067	0	51,548	51,548	51,548	end of 15
end of 16	76	35,177	120,353	3,274,310			3,429,840	0	52,991	52,991	52,991	end of 16
		0	0	0	0	0	0	0	946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 16: 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.

SIPS YOUR 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: DEMO ADVISOR
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

[Edit](#) [Dynamic Mode](#)

Scenario: Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	1.00 %	3.00 %	5.00 %			1,605,000					
initial amount		30,000	75,000	1,500,000			1,605,000					
bonus %		0.00 %	0.00 %	0.00 %			0					
w/bonus		30,000	75,000	1,500,000			1,605,000					
end of 1	61	30,300	77,250	1,575,000			1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	79,568	1,653,750			1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	81,955	1,736,437			1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	84,413	1,823,259			1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	86,946	1,914,422			2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	89,554	2,010,143			2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	92,241	2,110,650			2,235,054	0	41,330	41,330	41,330	end of 7
end of 8	68	32,486	95,008	2,216,182			2,343,676	0	42,487	42,487	42,487	end of 8
end of 9	69	32,811	97,858	2,326,991			2,457,660	0	43,677	43,677	43,677	end of 9
end of 10	70	33,139	100,794	2,443,341			2,577,273	0	44,900	44,900	44,900	end of 10
end of 11	71	33,470	103,818	2,565,508			2,702,795	0	46,157	46,157	46,157	end of 11
end of 12	72	33,805	106,932	2,693,783			2,834,520	0	47,449	47,449	47,449	end of 12
end of 13	73	34,143	110,140	2,828,472			2,972,755	0	48,778	48,778	48,778	end of 13
end of 14	74	34,484	113,444	2,969,896			3,117,824	0	50,144	50,144	50,144	end of 14
end of 15	75	34,829	116,848	3,118,390			3,270,067	0	51,548	51,548	51,548	end of 15
end of 16	76	35,177	120,353	3,274,310			3,429,840	0	52,991	52,991	52,991	end of 16
		0	0	0	0	0	0	0	946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 17: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

YOUR 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: DEMO ADVISOR

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

Scenario

Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon

1 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	1.00 %		3.00 %		5.00 %	1,605,000					
initial amount		30,000		75,000		1,500,000	1,605,000					
bonus %		0.00 %		0.00 %		0.00 %	0					
w/bonus		30,000		75,000		1,500,000	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	168,861	41,330	210,191	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	172,181	42,487	214,668	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	175,661	43,677	219,338	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	179,281	44,900	224,181	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	183,031	46,157	229,188	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	186,921	47,449	234,370	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	190,941	48,778	239,719	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	195,101	50,144	245,245	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	199,401	51,548	250,949	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	203,841	52,991	256,832	end of 16
									946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

Step 18: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

YOUR 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: DEMO ADVISOR

INITIAL PLAN DATE:

REVISED PLAN DATE:

Structured Income Planning

Edit

Dynamic Mode

Scenario

Editing the Maximum Percentage Amounts on the Allocation Codes

Planning Horizon

16 years

Year	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
net return	60	1.00 %		3.00 %		5.00 %	1,605,000					
initial amount		30,000		75,000		1,500,000	1,605,000					
bonus %		0.00 %		0.00 %		0.00 %	0					
w/bonus		30,000		75,000		1,500,000	1,605,000					
end of 1	61	30,300	0	77,250	0	1,575,000	1,682,550	0	150,000	0	150,000	end of 1
end of 2	62	30,603	0	79,568	0	1,653,750	1,763,920	0	153,000	0	153,000	end of 2
end of 3	63	30,909	0	81,955	0	1,736,437	1,849,301	0	156,060	0	156,060	end of 3
end of 4	64	31,218	0	84,413	0	1,823,259	1,938,890	0	159,181	0	159,181	end of 4
end of 5	65	31,530	0	86,946	0	1,914,422	2,032,898	0	162,365	0	162,365	end of 5
end of 6	66	31,846	0	89,554	0	2,010,143	2,131,542	0	165,612	0	165,612	end of 6
end of 7	67	32,164	0	92,241	0	2,110,650	2,235,054	0	168,861	41,330	210,191	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	2,343,676	0	172,181	42,487	214,668	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	2,457,660	0	175,661	43,677	219,338	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	2,577,273	0	179,281	44,900	224,181	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	2,702,795	0	183,031	46,157	229,188	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	2,834,520	0	186,921	47,449	234,370	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	2,972,755	0	190,941	48,778	239,719	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	3,117,824	0	195,101	50,144	245,245	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	3,270,067	0	199,401	51,548	250,949	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	3,429,840	0	203,841	52,991	256,832	end of 16
									946,218	469,461	1,415,679	

Orange backgrounds indicate hypothetical returns

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.