

# 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

**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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

**Allocation Code List**

Save | Cancel | Add Allocation Code

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

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

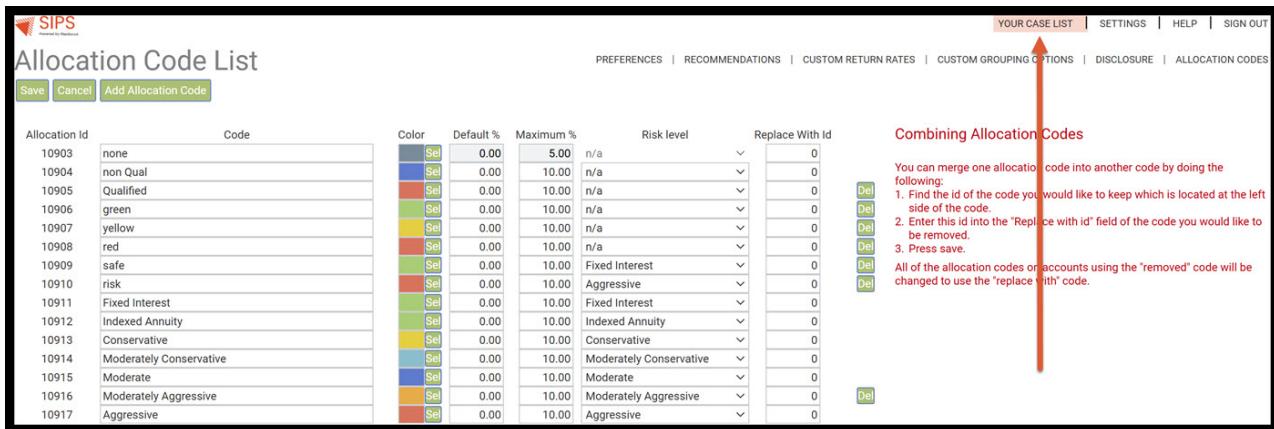
PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

**Allocation Code List**

Save | Cancel | Add Allocation Code

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

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



**Allocation Code List**

Allocation Id Code Color Default % Maximum % Risk level Replace With Id

10903	none	Sel	0.00	5.00	n/a	▼	0
10904	non Qual	Sel	0.00	10.00	n/a	▼	0
10905	Qualified	Sel	0.00	10.00	n/a	▼	0
10906	green	Sel	0.00	10.00	n/a	▼	0
10907	yellow	Sel	0.00	10.00	n/a	▼	0
10908	red	Sel	0.00	10.00	n/a	▼	0
10909	safe	Sel	0.00	10.00	Fixed Interest	▼	0
10910	risk	Sel	0.00	10.00	Aggressive	▼	0
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	▼	0
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	▼	0
10913	Conservative	Sel	0.00	10.00	Conservative	▼	0
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	▼	0
10915	Moderate	Sel	0.00	10.00	Moderate	▼	0
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	▼	0
10917	Aggressive	Sel	0.00	10.00	Aggressive	▼	0

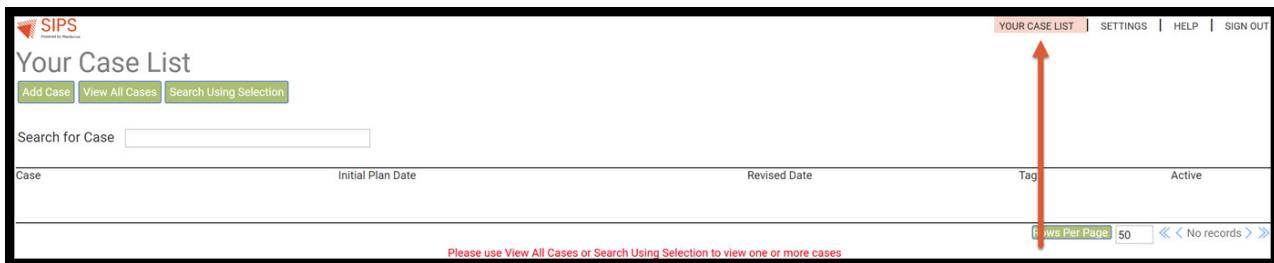
**Combining Allocation Codes**

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 or accounts using the "removed" code will be changed to use the "replace with" code.

Step 7: View All Cases: Click on the green View All Cases button underneath Your Case List heading.



**Your Case List**

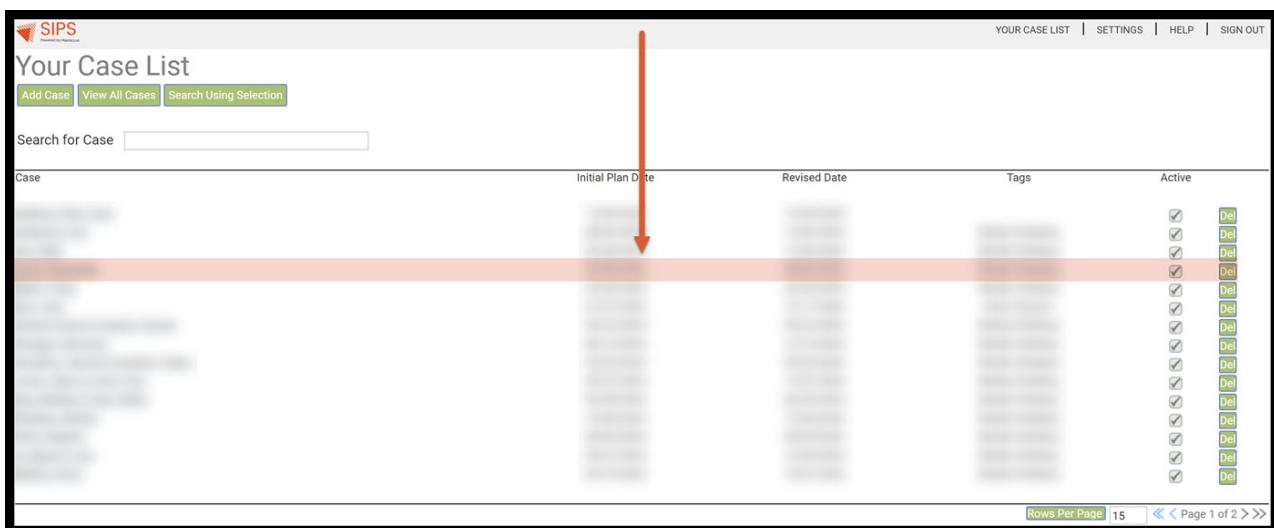
Add Case View All Cases Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
Please use View All Cases or Search Using Selection to view one or more cases				

Rows Per Page 50 << < Page 1 of 2 >>

Step 8: Case Selection: Select a case.



**Your Case List**

Add Case View All Cases Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
Please use View All Cases or Search Using Selection to view one or more cases				

Rows Per Page 15 << Page 1 of 2 >>

Step 9: Structured Income Planning: Click on the Structured Income Planning Button underneath the Client's name heading.

Client Information

Case Title:

Description:

Client one: Last  First  Client two: Last  First

Date of birth  Initial plan age  Short name

Current age  Retirement age  Gender: Female

Initial plan date  Revision date  Address

Short name: Client2

City, State, Zip  Gender: Female

Email  Phone  Cell Phone  Cell Phone

Selection tags: Active

List Clients Beneficiaries (optional):

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

Structured Income Planning

Planning Horizon: 16 years

Scenario: Editing the Maximum Percentage Amounts on the Allocation Codes

Checklist: Edit, Dynamic Mode

Table Data:

Year		Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
		Account	Income	Account	Income	Account	Income						
net return	60	1.00 %		3.00 %		5.00 %		1,605,000	Subtotal of account incomes	Infl Factor	Infl Factor		
initial amount		30,000	75,000	0	1,659,750	0	1,763,920	0	153,000	0	153,000		
bonus % w/bonus		0.00 %	0.00 %	0	0.00 %	0	0	1,605,000	0	156,060	0	156,060	
30,000		30,000	75,000	0	0	0	0	0	0	0	0	0	
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	1,659,750	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

Orange backgrounds indicate hypothetical returns.

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

**Structured Income Planning**

Edt 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

		Checking/Savings		Roth IRA		401(k)		Accounts Total	Planned Distribution	Wages	SS	Total Income	Year
Year		Account	Income	Account	Income	Account	Income						
net return	60	1.00 %	3.00 %	5.00 %	0.00 %	5.00 %	0.00 %						
initial amount		30,000	75,000	1,500,000	0	1,500,000	0	1,605,000	Subtotal 0 of account incomes	Manage	Manage		
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	1,605,000	Infl Factor 2.00 %	2.80 %			
w/bonus		30,000	75,000	1,500,000	0	1,500,000	0	1,628,550	0	150,000	0	150,000	
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	171,330	0	171,330	end of 7
end of 8	68	32,486	0	95,008	0	2,216,182	0	2,343,676	0	174,487	0	174,487	end of 8
end of 9	69	32,811	0	97,858	0	2,326,991	0	2,457,660	0	178,677	0	178,677	end of 9
end of 10	70	33,139	0	100,794	0	2,443,341	0	2,577,273	0	182,900	0	182,900	end of 10
end of 11	71	33,470	0	103,818	0	2,565,508	0	2,702,795	0	187,157	0	187,157	end of 11
end of 12	72	33,805	0	106,932	0	2,693,783	0	2,834,520	0	191,449	0	191,449	end of 12
end of 13	73	34,143	0	110,140	0	2,828,472	0	2,972,755	0	195,778	0	195,778	end of 13
end of 14	74	34,484	0	113,444	0	2,969,896	0	3,117,824	0	200,144	0	200,144	end of 14
end of 15	75	34,829	0	116,848	0	3,118,390	0	3,270,067	0	204,548	0	204,548	end of 15
end of 16	76	35,177	0	120,353	0	3,274,310	0	3,429,840	0	209,991	0	209,991	end of 16
		0	0	0	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.

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

Orange backgrounds indicate hypothetical returns

Structured Income Type

Income Riders

Start payout from income rider

ADD INCOME

Pick year(s) OR

Liquidate or annuitize

Annuitize (for years certain) 1.0 %

Liquidate account (in so many years)

Start year for rest of plan OR

Withdrawals

Annual fixed withdrawal

Annual percentage withdrawal 0.0 %

Required minimum distribution (RMD)

Beneficial IRA RMD (based on beneficiaries life)

Start year for X years 0

Pick year(s) to remove

Remove year to end of plan

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		

Calculated Plan Withdrawals

Make-up total owners RMD from one account

Make-up total benefit RMD from one account

Make-up income gap based on target income

Annual Savings

Annual fixed savings

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  
Software for Financial Planners

## 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	<input type="checkbox"/> 0
Asset plan allocation	Moderate - max 10.0%
Risk level	none
Account owner	
Account type	IRA
Add an income rider	<input checked="" type="radio"/> age <input type="radio"/> Client's age <input type="radio"/> Joint
Select income rider	<input type="button" value="Select"/>
Number of months of payout in first year	
Enter manual payout	<input type="checkbox"/>
<input type="button" value="Request Additional Rider"/> <input type="button" value="Remove Income Rider"/>	
Orange backgrounds indicate hypothetical returns	

**Structured Income Type**

Income Riders

Start payout from income rider

**ADD INCOME**

OR  OR  OR

**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		

**Liquidate or annuitize**

Annuitize (for years certain)  %  OR  OR

Liquidate account (in so many years)

**Withdrawals**

Annual fixed withdrawal

Annual percentage withdrawal  %  OR

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 benefit RMD from one account  Make-up income gap based on target income

**Annual Savings**

Annual fixed savings

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  
Software for Financial Planners

## 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	<input type="checkbox"/> 0
Years deferred	
Asset plan allocation	Moderate - max 10.0%
Risk level	Moderate
Account owner	
Account type	IRA
Add an income rider	<input checked="" type="radio"/> age <input type="radio"/> Client's age <input type="radio"/> Joint
Select income rider	<input type="button" value="Select"/>
Number of months of payout in first year	12.0
Enter manual payout	<input type="checkbox"/>
<input type="button" value="Request Additional Rider"/> <input type="button" value="Remove Income Rider"/>	
Orange backgrounds indicate hypothetical returns	

**Structured Income Type**

Income Riders

Start payout from income rider

**ADD INCOME**

OR  OR  OR

**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		

**Liquidate or annuitize**

Annuitize (for years certain)  %  OR  OR

Liquidate account (in so many years)

**Withdrawals**

Annual fixed withdrawal

Annual percentage withdrawal  %  OR

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 benefit RMD from one account  Make-up income gap based on target income

**Annual Savings**

Annual fixed savings

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

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

## 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

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 %	1,500,000	0	1,605,000	0	1,682,550	0	150,000		
initial amount		30,000	75,000	0	0.00 %	0.00 %	0	0	0	0	0		
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0	0	0	0	0		
		30,000	75,000	0	30,000	75,000	0	0	0	0	0		
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	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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

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 %	1,500,000	0	1,605,000	0	1,682,550	0	150,000		
initial amount		30,000	75,000	0	0.00 %	0.00 %	0	0	0	0	0		
bonus % w/bonus		0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0	0	0	0	0		
		30,000	75,000	0	30,000	75,000	0	0	0	0	0		
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	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

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

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

## 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 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 %	1,500,000	0.00 %	1,605,000	0	1,682,550	0	150,000	
initial amount		30,000	75,000					Subtotal of account incomes		Manage	Manage	
bonus % w/bonus		0.00 %	0.00 %						2.00 %	2.80 %		
	30,000	Manage	75,000	Manage	1,500,000	Manage	1,605,000					
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 2	62	30,603	0	79,568	0	1,653,750	0	1,763,920	0	153,000	0	153,000
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 4	64	31,218	0	84,413	0	1,823,259	0	1,938,890	0	159,181	0	159,181
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 6	66	31,846	0	89,554	0	2,010,143	0	2,131,542	0	165,612	0	165,612
end of 7	67	32,164	0	92,241	0	2,110,650	0	2,235,054	0	41,330	0	41,330
end of 8	68	32,486	0	95,008	0	2,216,182	0	2,343,676	0	42,487	0	42,487
end of 9	69	32,811	0	97,858	0	2,326,991	0	2,457,660	0	43,677	0	43,677
end of 10	70	33,139	0	100,794	0	2,443,341	0	2,577,273	0	44,900	0	44,900
end of 11	71	33,470	0	103,818	0	2,565,508	0	2,702,795	0	46,157	0	46,157
end of 12	72	33,805	0	106,932	0	2,693,783	0	2,834,520	0	47,449	0	47,449
end of 13	73	34,143	0	110,140	0	2,828,472	0	2,972,755	0	48,778	0	48,778
end of 14	74	34,484	0	113,444	0	2,969,896	0	3,117,824	0	50,144	0	50,144
end of 15	75	34,829	0	116,848	0	3,118,390	0	3,270,067	0	51,548	0	51,548
end of 16	76	35,177	0	120,353	0	3,274,310	0	3,429,840	0	52,991	0	52,991
		0	0	0	0	0	0	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

PREPARED BY: DEMO ADVISOR  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

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 %	1,500,000	0.00 %	1,605,000	0	1,682,550	0	150,000	
initial amount		30,000	75,000					Subtotal of account incomes		Manage	Manage	
bonus % w/bonus		0.00 %	0.00 %						2.00 %	2.80 %		
	30,000	Manage	75,000	Manage	1,500,000	Manage	1,605,000					
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 2	62	30,603	0	79,568	0	1,653,750	0	1,763,920	0	153,000	0	153,000
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 4	64	31,218	0	84,413	0	1,823,259	0	1,938,890	0	159,181	0	159,181
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 6	66	31,846	0	89,554	0	2,010,143	0	2,131,542	0	165,612	0	165,612
end of 7	67	32,164	0	92,241	0	2,110,650	0	2,235,054	0	41,330	0	41,330
end of 8	68	32,486	0	95,008	0	2,216,182	0	2,343,676	0	42,487	0	42,487
end of 9	69	32,811	0	97,858	0	2,326,991	0	2,457,660	0	43,677	0	43,677
end of 10	70	33,139	0	100,794	0	2,443,341	0	2,577,273	0	44,900	0	44,900
end of 11	71	33,470	0	103,818	0	2,565,508	0	2,702,795	0	46,157	0	46,157
end of 12	72	33,805	0	106,932	0	2,693,783	0	2,834,520	0	47,449	0	47,449
end of 13	73	34,143	0	110,140	0	2,828,472	0	2,972,755	0	48,778	0	48,778
end of 14	74	34,484	0	113,444	0	2,969,896	0	3,117,824	0	50,144	0	50,144
end of 15	75	34,829	0	116,848	0	3,118,390	0	3,270,067	0	51,548	0	51,548
end of 16	76	35,177	0	120,353	0	3,274,310	0	3,429,840	0	52,991	0	52,991
		0	0	0	0	0	0	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](mailto:support@planscout.com).