

Troubleshooting: "social security information is blank." Error Message

08/07/2025 2:04 pm EDT

This article addresses the error message that you may receive that says 'social security information is blank' when adding Social Security income on the Structured Income Planning page without prior entry on the Client Dashboard Incomes page.

Below is a hypothetical example of a client that would like to retire at age 67 and you would like to enter in the social security income when you are at the Structured Income Planning page.

To learn more about Add Inc Tax functions within SIPS Essentials see articles:

- [Calculating and Applying Tax Rates in SIPS Essentials](#)
- [Setting Effective Tax Rates for SIPS Essentials](#)

If you would like to learn more about advanced tax planning in SIPS Advanced see article:

- [Understanding the Advanced Tax Planning Page](#)

To learn about setting up tax calculations options for income and expenses see articles:

- [Tax Calculation Option: Adding Assets into a Structured Income Plan](#)
- [Tax Calculation Option: Adding Income and Expenses into a Structured Income Plan](#)

To learn more about forecasting effective tax rates see articles:

- [Part One: Forecasting Effective Tax Rates While the Client is working](#)

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

Structured Income Planning															
Edit		Dynamic Mode													
Scenario		SS Error Message													
Planning Horizon		20 years		Accounts				Incomes							
		Brokerage Account		IRA		ROTH									
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	Total Income	Target Income	Income Gap	Year
Net return	60	3.00 %		3.50 %	Jane IRA	4.00 %		1,800,000	0		Infl Factor		Infl Factor	from total income to target	
Initial amount		1,000,000		750,000		50,000		1,800,000	0		2.00 %		2.00 %		
Bonus % w/bonus		0.00 %		0.00 %		0.00 %		1,800,000	0						
		1,000,000		750,000		50,000		1,800,000	0						
end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	150,000	0	150,000	end of 1
end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	153,000	0	153,000	end of 2
end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	156,060	0	156,060	end of 3
end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	159,181	0	159,181	end of 4
end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	162,365	0	162,365	end of 5
end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	165,612	0	165,612	end of 6
end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	168,924	0	168,924	end of 7
end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	172,303	0	172,303	end of 8
end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	75,000	75,000	0	end of 9
end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	76,500	76,500	0	end of 10
end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	78,030	78,030	0	end of 11
end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	79,591	79,591	0	end of 12
end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	81,182	81,182	0	end of 13
end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	82,806	82,806	0	end of 14
end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	84,462	84,462	0	end of 15
end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	86,151	86,151	0	end of 16
end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	87,874	87,874	0	end of 17
end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	89,632	89,632	0	end of 18
end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	91,425	91,425	0	end of 19
end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	93,253	93,253	0	end of 20
		722,381		271,525		12,000		1,005,907			1,287,445	2,293,352	1,005,907	1,287,445	

Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning heading.

Structured Income Planning

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

Scenario: SS Error Message

Planning Horizon: 20 years

Accounts: Brokerage Account, IRA, ROTH

Total required	Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	Total Income	Target Income	Income Gap	Year
View Beneficial RMD																
REGULAR RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %		1,800,000	Subtotal		Manage		Manage	from total	
across all accounts	initial amount		1,000,000	750,000	50,000	Jane inc	50,000		0	of account		Manage		Manage	income to	
Jane	bonus %		0.00 %	0.00 %	0.00 %				1,800,000	incomes		2.00 %		2.00 %	target	
total RMD	w/bonus		1,000,000	750,000	50,000											
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	172,303	0	172,303	end of 8
0	end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	75,000	75,000	0	end of 9
0	end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	76,500	76,500	0	end of 10
0	end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	78,030	78,030	0	end of 11
0	end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	79,591	79,591	0	end of 12
0	end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	81,182	81,182	0	end of 13
0	end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	82,806	82,806	0	end of 14
0	end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	84,462	84,462	0	end of 15
51,078	end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	86,151	86,151	0	end of 16
52,718	end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	87,874	87,874	0	end of 17
54,167	end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	89,632	89,632	0	end of 18
55,894	end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	91,425	91,425	0	end of 19
57,669	end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	93,253	93,253	0	end of 20
					722,381		271,525	12,000		1,005,907		1,287,445	2,293,352	1,005,907	1,287,445	

Step 3: Other Income Name: Enter in a title for the column. (SS)

Manage Income

[Save](#)
[Cancel](#)

Other income name:

This is a Social Security income: ☐

First year income:

Inflation rate: 0.0 %

Number of months of income in first year: 12.0

Income description:

Delay the income start until age: ☐

Age to begin income: 0 ☒ Client 1 age ☐ Client 2 age

Tax calculation option: Not Taxable

Income Adjustments

ADD ADJUSTMENT:

Pick year(s):

Pick year(s) to remove:

Reset all years:

Year	Income adjustment
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input type="checkbox"/>
7	<input type="checkbox"/>
8	<input type="checkbox"/>
9	<input type="checkbox"/>
10	<input type="checkbox"/>
11	<input type="checkbox"/>
12	<input type="checkbox"/>
13	<input type="checkbox"/>
14	<input type="checkbox"/>
15	<input type="checkbox"/>
16	<input type="checkbox"/>
17	<input type="checkbox"/>
18	<input type="checkbox"/>
19	<input type="checkbox"/>
20	<input type="checkbox"/>
21	<input type="checkbox"/>
22	<input type="checkbox"/>
23	<input type="checkbox"/>
24	<input type="checkbox"/>

Step 4: This is Social Security Checkbox: Click on the checkbox.

Manage Income

[Save](#) [Cancel](#)

Other income name

☐ This is a Social Security income

First year income

Inflation rate %

Number of months of income in first year

Income description

Delay the income start until age ☐

Age to begin income ☒ Client 1 age ☐ Client 2 age

Tax calculation option

ADD ADJUSTMENT

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

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

[Reset all years](#)

Income Adjustments

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

Step 5: Ok for The Error Message: Click the okay button for the error message.

Manage Income

[Save](#) [Cancel](#)

Client 1 social security information is blank. Please visit the client information page to add this information.

Other income name

ADD ADJUSTMENT

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

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

[Reset all years](#)

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	

Step 6: Cancel: Click the green cancel button underneath the manage income subheading.

Manage Income

[Save](#) [Cancel](#)

Client 1 Social Security information is blank. Please visit the client information page to add this information.

Other income name:

This is a Social Security income: ☐

First year income:

Inflation rate: %

Number of months of income in first year:

Income description:

Delay the income start until age: ☒

Age to begin income: ☒ Client 1 age ☐ Client 2 age

Tax calculation option:

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
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Step 7: Client Dashboard: Click on the client dashboard button underneath the clients name.

Doe, Jane

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: 01/01/2025
REVISED PLAN DATE: 07/08/2025

Structured Income Planning

Edit

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

ScenarioSS Error Message

Planning Horizon20 years

Accounts

Brokerage Account

IRA

ROTH

Incomes

Total required	Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year
<div>View Beneficial RMD</div>	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %	50,000	1,800,000	Subtotal of account incomes		<div>Manage Inflation Factor</div>	<div>Manage Inflation Factor</div>				
REGULAR RMD	initial amount		1,000,000	750,000	0.00 %	Jane inc	0.00 %	50,000	0			<div>Manage Inflation Factor</div>	<div>Manage Inflation Factor</div>				
across all accounts	bonus %		0.00 %	750,000	0.00 %		0.00 %	50,000	1,800,000			2.00 %	0.00 %				from total income to target
Jane total RMD	w/bonus		1,000,000	<div>Manage</div>	750,000	<div>Manage</div>	50,000	<div>Manage</div>				2.00 %	0.00 %				
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	0	172,303	0	172,303	end of 8
0	end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	0	75,000	75,000	0	end of 9
0	end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	0	76,500	76,500	0	end of 10
0	end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	0	78,030	78,030	0	end of 11
0	end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	0	79,591	79,591	0	end of 12
0	end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	0	81,182	81,182	0	end of 13
0	end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	0	82,806	82,806	0	end of 14
0	end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	0	84,462	84,462	0	end of 15
51,078	end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	0	86,151	86,151	0	end of 16
52,718	end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	0	87,874	87,874	0	end of 17
54,167	end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	0	89,632	89,632	0	end of 18
55,894	end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	0	91,425	91,425	0	end of 19
57,669	end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	0	93,253	93,253	0	end of 20
			722,381		271,525		12,000		1,005,907			1,287,445	0	2,293,352	1,005,907	1,287,445	

Step 8: GoTo Incomes: Click on the green GoTo Incomes button underneath the Client Information heading.

Client Information

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

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

Case Title: **Doe, Jane** Active

Description:

Selection tags: **Demo Advisor**

Client one: Last: **Doe** First: **Jane** Client two: Last: First:

Date of birth: **01/01/1965** Initial plan age: **60** Date of birth: Initial plan age: **0**

Current age: **60** Retirement age: **67** Current age: Retirement age: **0**

Gender: **Female** Gender: **Female**

Initial plan date: **01/01/2025** Revision date: **07/08/2025**

Short name: **Client2** Address:

City, State, Zip:

Email:

Phone:

Cell Phone:

Cell Phone:

Step 9: Edit: Click on the green edit button underneath the Incomes heading.

Incomes

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

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

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %		0.0	Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	67		Projected benefits	unknown	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 10: Social Security: Enter in the Social Security Information. (Client will retire at 67, yearly pay \$24,000, 2% COLA)

Incomes

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

[Edit](#) [Save](#) [Cancel](#)

☐ Enter monthly amounts ☒ Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %		0.0	Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	67		Projected benefits	unknown	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 11: Save: Click on the green save button underneath the Incomes heading.

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

Edit Save Cancel

☐ Enter monthly amounts ☒ Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %		0.0	Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	24,000	Projected benefits	unknown	
	67			70	
	70				
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		2.0	Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 12: Social Security Numbers: SIPS will have automatically filtered in the all the years social security number.

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

Edit Goto Assets >>

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %		0.0	Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	\$16,800	Projected benefits	unknown	
	67	\$24,000		70	
	70	\$29,760			
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		2.0	Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 13: Structured Income Planning: Click on the Structured Income Planning button underneath the Clients name.

Doe, Jane PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 01/01/2025
REVISED PLAN DATE: 07/08/2025

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

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

Edit Goto Assets >>

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %		0.0	Expected wage increase while working %		0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	\$16,800	Projected benefits	unknown	
	67	\$24,000		70	
	70	\$29,760			
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		2.0	Expected COLA increase %		0.0

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Step 14: Edit: Click on the green Edit button underneath the Structured Income Planning heading.

Structured Income Planning																
Scenario		SS Error Message														
Planning Horizon		20 years		Accounts				Incomes								
				Brokerage Account		IRA		ROTH								
Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year
net return	60	3.00 %		3.50 %	Jane IRA	4.00 %										
Initial amount		1,000,000		750,000	Jane Inc	50,000		1,800,000	Subtotal of account incomes		Infl Factor	Infl Factor		Infl Factor	from total income to target	
bonus % w/bonus		0.00 %		0.00 %		0.00 %		0			2.00 %	0.00 %		2.00 %		
		1,000,000		750,000		50,000		1,800,000								
end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	0	172,303	0	172,303	end of 8
end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	0	75,000	75,000	0	end of 9
end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	0	76,500	76,500	0	end of 10
end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	0	78,030	78,030	0	end of 11
end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	0	79,591	79,591	0	end of 12
end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	0	81,182	81,182	0	end of 13
end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	0	82,806	82,806	0	end of 14
end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	0	84,462	84,462	0	end of 15
end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	0	86,151	86,151	0	end of 16
end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	0	87,874	87,874	0	end of 17
end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	0	89,632	89,632	0	end of 18
end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	0	91,425	91,425	0	end of 19
end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	0	93,253	93,253	0	end of 20
		722,381		271,525		12,000		1,005,907			1,287,445	0	2,293,352	1,005,907	1,287,445	

Step 15: Manage: Click on the green manage button within the SS column.

Structured Income Planning																
Scenario		SS Error Message														
Planning Horizon		20 years		Accounts				Incomes								
				Brokerage Account		IRA		ROTH								
Total required	Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap
View Beneficial RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %					Manage	Manage			
REGULAR RMD	Initial amount		1,000,000		750,000	Jane Inc	50,000		1,800,000	Subtotal of account incomes		Infl Factor	Infl Factor		Infl Factor	Income to target
across all accounts	bonus % w/bonus		0.00 %		0.00 %		0.00 %		0			2.00 %	0.00 %		2.00 %	
Jane total RMD			1,000,000		750,000		50,000		1,800,000							
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	0	172,303	0	172,303
0	end of 9	68	1,230,773	74,000	1,022,173	0	70,166	1,000	2,323,111	75,000	3.23 %	0	0	75,000	75,000	0
0	end of 10	69	1,192,196	75,500	1,057,949	0	71,972	1,000	2,322,117	76,500	3.29 %	0	0	76,500	76,500	0
0	end of 11	70	1,150,932	77,030	1,094,977	0	73,851	1,000	2,319,760	78,030	3.36 %	0	0	78,030	78,030	0
0	end of 12	71	1,106,869	78,591	1,133,301	0	75,805	1,000	2,315,975	79,591	3.43 %	0	0	79,591	79,591	0
0	end of 13	72	1,059,893	80,182	1,172,967	0	77,837	1,000	2,310,696	81,182	3.51 %	0	0	81,182	81,182	0
0	end of 14	73	1,009,883	81,806	1,214,020	0	79,951	1,000	2,303,854	82,806	3.58 %	0	0	82,806	82,806	0
0	end of 15	74	956,718	83,462	1,256,511	0	82,149	1,000	2,295,377	84,462	3.67 %	0	0	84,462	84,462	0
51,078	end of 16	75	951,345	34,074	1,249,411	51,078	84,435	1,000	2,285,191	86,151	3.75 %	0	0	86,151	86,151	0
52,718	end of 17	76	945,729	34,157	1,240,423	52,718	86,812	1,000	2,272,964	87,874	3.85 %	0	0	87,874	87,874	0
54,167	end of 18	77	939,636	34,465	1,229,671	54,167	89,285	1,000	2,258,591	89,632	3.94 %	0	0	89,632	89,632	0
55,894	end of 19	78	933,294	34,530	1,216,815	55,894	91,856	1,000	2,241,966	91,425	4.05 %	0	0	91,425	91,425	0
57,669	end of 20	79	926,709	34,584	1,201,734	57,669	94,530	1,000	2,222,974	93,253	4.16 %	0	0	93,253	93,253	0
		722,381		271,525		12,000		1,005,907			1,287,445	0	2,293,352	1,005,907	1,287,445	

Step 16: This is Social Security Checkbox: Unclick the This is Social Security Checkbox.

Manage Income

[Save](#) [Cancel](#)

Other income name

☒ This is a Social Security income

First year income

Inflation rate %

Number of months of income in first year

Income description

Delay the income start until age ☒

Age to begin income ☒ Client 1 age ☐ Client 2 age

Tax calculation option

ADD ADJUSTMENT

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

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

[Reset all years](#)

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
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23	
24	

Step 17: This is Social Security Checkbox: Click on the This is Social Security Checkbox. The information that was put in on the incomes page in the client dashboard should automatically be filtered in after you click on the checkbox.

Manage Income

[Save](#) [Cancel](#)

Other income name

☐ This is a Social Security income

First year income

Inflation rate %

Number of months of income in first year

Income description

Delay the income start until age ☒

Age to begin income ☒ Client 1 age ☐ Client 2 age

Tax calculation option

ADD ADJUSTMENT

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

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

[Reset all years](#)

Income Adjustments

Year	Income adjustment
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
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14	
15	
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Step 18: Tax Calculation Option: SIPS should have automatically changed the tax calculation option to Social Security (Line 6a of the tax form).

Manage Income

Save **Cancel**

Other income name:

This is a Social Security income: ☒

First year income:


Inflation rate: %

Number of months of income in first year:

Income description:

Delay the income start until age: ☒

Age to begin income: ☒ Client 1 age ☐ Client 2 age

Tax calculation option: 

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Year	Income adjustment
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input type="checkbox"/>
7	<input type="checkbox"/>
8	<input type="checkbox"/>
9	<input type="checkbox"/>
10	<input type="checkbox"/>
11	<input type="checkbox"/>
12	<input type="checkbox"/>
13	<input type="checkbox"/>
14	<input type="checkbox"/>
15	<input type="checkbox"/>
16	<input type="checkbox"/>
17	<input type="checkbox"/>
18	<input type="checkbox"/>
19	<input type="checkbox"/>
20	<input type="checkbox"/>
21	<input type="checkbox"/>
22	<input type="checkbox"/>
23	<input type="checkbox"/>
24	<input type="checkbox"/>

Step 19: Save: Click on the green save button underneath the Manage Income heading.

Manage Income

Save **Cancel**

Other income name:

This is a Social Security income: ☒

First year income:

Inflation rate: %

Number of months of income in first year:

Income description:

Delay the income start until age: ☒

Age to begin income: ☒ Client 1 age ☐ Client 2 age

Tax calculation option:

ADD ADJUSTMENT

Pick year(s)

Pick year(s) to remove

Reset all years

Year	Income adjustment
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input type="checkbox"/>
7	<input type="checkbox"/>
8	<input type="checkbox"/>
9	<input type="checkbox"/>
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19	<input type="checkbox"/>
20	<input type="checkbox"/>
21	<input type="checkbox"/>
22	<input type="checkbox"/>
23	<input type="checkbox"/>
24	<input type="checkbox"/>

Step 20: Structured Income Planning Page: You will automatically be taken back to the Structured Income Planning Page.

Structured Income Planning

Edit

Save

Cancel

Add Account

Add Income

Add Inc Tax

Add Target

Edit or Add Scenario

Display Options

Scenario

SS Error Message

Planning Horizon

20 years

Accounts

Brokerage Account

IRA

ROTH

Incomes

Total required

View Beneficial RMD

REGULAR RMD

across all accounts

Jane

total RMD

Year

net return

initial amount

bonus %

w/bonus

60

1,000,000

0.00 %

1,000,000

Manage

750,000

Manage

50,000

Manage

1,800,000

0

Subtotal of account incomes

1,800,000

0

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Step 21: SS Column: A new column will have automatically be within the plan, the SS column displaying the correct amounts.

Structured Income Planning

EditSaveCancelAdd AccountAdd IncomeAdd Inc TaxAdd TargetEdit or Add ScenarioDisplay Options

ScenarioSS Error Message

Planning Horizon20 years

Accounts

Brokerage AccountIRAROTH

Incomes

Total required	Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year
View Beneficial RMD												Manage	Manage		Manage	from total income to target	
REGULAR RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %					2.00 %	2.00 %				
across all accounts	initial amount		1,000,000		750,000		50,000		1,800,000	Subtotal of account incomes							
Jane total RMD	bonus w/bonus		0.00 %		0.00 %	Jane inc	0.00 %		0								
			1,000,000	Manage	750,000	Manage	50,000	Manage	1,800,000								
0	end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1
0	end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2
0	end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3
0	end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4
0	end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5
0	end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6
0	end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7
0	end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	26,498	198,801	0	198,801	end of 8
0	end of 9	68	1,257,801	46,972	1,022,173	0	70,166	1,000	2,350,139	47,972	2.07 %	0	27,028	75,000	75,000	0	end of 9
0	end of 10	69	1,247,603	47,931	1,057,949	0	71,972	1,000	2,377,524	48,931	2.08 %	0	27,569	76,500	76,500	0	end of 10
0	end of 11	70	1,236,121	48,910	1,094,977	0	73,851	1,000	2,404,949	49,910	2.10 %	0	28,120	78,030	78,030	0	end of 11
0	end of 12	71	1,223,296	49,908	1,133,301	0	75,805	1,000	2,432,402	50,908	2.12 %	0	28,682	79,591	79,591	0	end of 12
0	end of 13	72	1,209,069	50,926	1,172,967	0	77,837	1,000	2,459,873	51,926	2.14 %	0	29,256	81,182	81,182	0	end of 13
0	end of 14	73	1,193,376	51,965	1,214,020	0	79,951	1,000	2,487,347	52,965	2.15 %	0	29,841	82,806	82,806	0	end of 14
0	end of 15	74	1,176,153	53,024	1,256,511	0	82,149	1,000	2,514,812	54,024	2.17 %	0	30,438	84,462	84,462	0	end of 15
51,078	end of 16	75	1,208,410	3,027	1,249,411	51,078	84,435	1,000	2,542,256	55,105	2.19 %	0	31,047	86,151	86,151	0	end of 16
52,718	end of 17	76	1,242,173	2,489	1,240,423	52,718	86,812	1,000	2,569,408	56,207	2.21 %	0	31,668	87,874	87,874	0	end of 17
54,167	end of 18	77	1,277,274	2,164	1,229,671	54,167	89,285	1,000	2,596,230	57,331	2.23 %	0	32,301	89,632	89,632	0	end of 18
55,894	end of 19	78	1,314,009	1,584	1,216,815	55,894	91,856	1,000	2,622,680	58,478	2.25 %	0	32,947	91,425	91,425	0	end of 19
57,669	end of 20	79	1,352,451	978	1,201,734	57,669	94,530	1,000	2,648,716	59,647	2.28 %	0	33,606	93,253	93,253	0	end of 20
			359,880		271,525		12,000		643,405			1,287,445	388,999	2,319,850	1,005,907	1,313,943	

Step 22: Save: Click on the green Save button underneath the Structured Income Planning heading.

Structured Income Planning

Edit Save Cancel Add Account Add Income Add Inc Tax Add Target Edit or Add Scenario Display Options

Scenario SS Error Message

Accounts										Incomes									
		Planning Horizon	20 years		Brokerage Account		IRA		ROTH		Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year
Toal required	eneficial RMD	Year	Jane	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Percent Distribution	Work	SS	Total Income	Target Income	Income Gap	Year	
View	eneficial RMD	net return	60	3.00 %		3.50 %	Jane IRA	4.00 %		1,800,000	Subtotal of account incomes		Manage Infi Factor	Manage Infi Factor		Manage Infi Factor	from total income to target		
accro	s all accounts	initial amount		1,000,000		750,000		50,000		1,800,000			2.00 %	2.00 %					
		bonus % w/bonus		0.00 %		0.00 %	Jane inc	0.00 %											
		Jane total RMD		1,000,000	Manage	750,000	Manage	50,000	Manage										
0		end of 1	60	1,030,000	0	776,250	0	52,000	0	1,858,250	0	0.00 %	150,000	0	150,000	0	150,000	end of 1	
0		end of 2	61	1,060,900	0	803,419	0	54,080	0	1,918,399	0	0.00 %	153,000	0	153,000	0	153,000	end of 2	
0		end of 3	62	1,092,727	0	831,538	0	56,243	0	1,980,509	0	0.00 %	156,060	0	156,060	0	156,060	end of 3	
0		end of 4	63	1,125,509	0	860,642	0	58,493	0	2,044,644	0	0.00 %	159,181	0	159,181	0	159,181	end of 4	
0		end of 5	64	1,159,274	0	890,765	0	60,833	0	2,110,871	0	0.00 %	162,365	0	162,365	0	162,365	end of 5	
0		end of 6	65	1,194,052	0	921,941	0	63,266	0	2,179,260	0	0.00 %	165,612	0	165,612	0	165,612	end of 6	
0		end of 7	66	1,229,874	0	954,209	0	65,797	0	2,249,880	0	0.00 %	168,924	0	168,924	0	168,924	end of 7	
0		end of 8	67	1,266,770	0	987,607	0	68,428	0	2,322,805	0	0.00 %	172,303	26,498	198,801	0	198,801	end of 8	
0		end of 9	68	1,257,801	46,972	1,022,173	0	70,166	1,000	2,350,139	47,972	2.07 %	0	27,028	75,000	75,000	0	end of 9	
0		end of 10	69	1,247,603	47,931	1,057,949	0	71,972	1,000	2,377,524	48,931	2.08 %	0	27,569	76,500	76,500	0	end of 10	
0		end of 11	70	1,236,121	48,910	1,094,977	0	73,851	1,000	2,404,949	49,910	2.10 %	0	28,120	78,030	78,030	0	end of 11	
0		end of 12	71	1,223,296	49,908	1,133,301	0	75,805	1,000	2,432,402	50,908	2.12 %	0	28,682	79,591	79,591	0	end of 12	
0		end of 13	72	1,209,069	50,926	1,172,967	0	77,837	1,000	2,459,873	51,926	2.14 %	0	29,256	81,182	81,182	0	end of 13	
0		end of 14	73	1,193,376	51,965	1,214,020	0	79,951	1,000	2,487,347	52,965	2.15 %	0	29,841	82,806	82,806	0	end of 14	
0		end of 15	74	1,176,153	53,024	1,256,511	0	82,149	1,000	2,514,812	54,024	2.17 %	0	30,438	84,462	84,462	0	end of 15	
51,078		end of 16	75	1,208,410	3,027	1,249,411													

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.