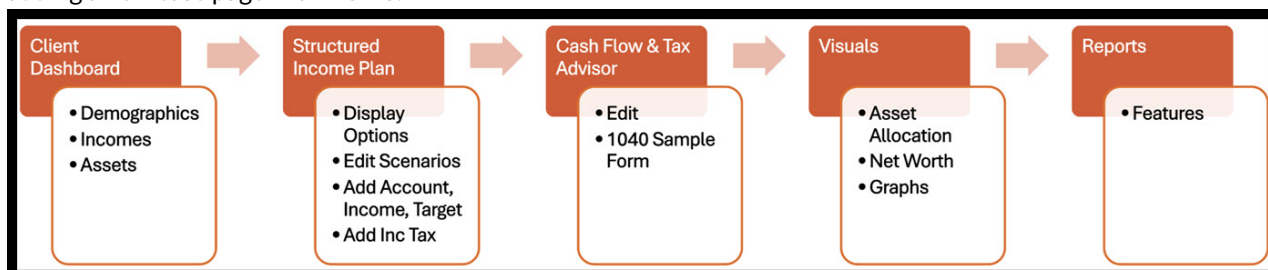


# Step-By-Step Guide For Building A Structured Income Plan

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**Introduction:** This article will walk you step by step on how to build a structured income plan starting from the adding a new case page within SIPS.



**Preliminary Information:** Before starting to build a structured income plan, you need to understand your client's financial goals and objectives for retirement. In addition to ensuring clients have enough to sustain their lifestyle in their structured income plan, some common goal themes are travel, spending time with family and friends, personal growth, volunteering, health and wellness, hobbies, part-time work, and greater control over their time. Within SIPS there is a designated Goals and Objectives section where this information can be stored.

*Related Articles and Sections:* [Goals and Objectives](#), [Case Studies](#)

**Step 1: Client Dashboard:** Once you have collected your client's financial goals and objectives, you can begin entering the data into SIPS. After you log in and create a new case, you will start within the Client Dashboard section of SIPS. This is the section where you will manually enter information on the client's demographics, incomes, and assets.

*Related Articles and Sections:* [Adding a New Case](#), [Client Information](#), [Incomes](#), [Assets](#), [Case Studies](#)

**Step 2: Structured Income Plan:** The plan is read from left to right and top to bottom. **Display Options** allow you to adjust visual elements of the plan. **Edit or Add Scenario** lets you customize and modify the plan's columns. **Account Information** is organized into setup details, transaction activity, and a yearly schedule, while **Add Income** includes rules and annual adjustments. The **Add Income Tax** section supports both basic and advanced tax planning, and **Add Target** allows you to create and adjust a target income, which is sometimes called the target annual after-tax cashflow or annual spending target.

*Related Sections:* [Structured Income Plan>Getting Started](#), [Structured Income Plan>Display Options](#), [Structured Income Plan>Edit or Add Scenarios](#), [Structured Income Plan>Add Account](#), [Structured Income Plan>Add Income](#), [Structured Income Plan>Add Inc Tax](#), [Structured Income Plan>Add Target](#)

**Step 3: Cash Flow and Tax Advisor:** This page is used to analyze yearly cash flow and effective tax rates. This section includes articles and tools that explain features such as condense/uncondense, hide/unhide views, and downloading a 1040 sample form. It also provides examples of forecasting effective tax rates, including when the client is working, when RMDs begins, when Social Security start, and during Roth conversions.

*Related Section:* [Cash Flow and Tax Advisor](#)

**Step 4: Visuals:** The Asset Allocation, Net Worth, and Graphs sections provide visual summaries of the client's financial position.

*Related Section: [Asset Allocation, Net Worth, and Graphs](#)*

**Step 5: Reports:** Once all major sections have been completed and your work is confirmed, navigate to the Reports section to generate a customizable snapshot of your client's financial data. Reports are created as PDF documents, making them easy to share digitally or provide in printed form.

*Related Section: [Reports](#)*

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).

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