

Incomes

01/09/2026 11:33 am EST

Within the Client Dashboard, the Income page is where you can enter the client's income information. Below is a step-by-step guide for entering data into the Incomes page.

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

The screenshot shows the 'Incomes' page in a client dashboard. At the top, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these are 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main heading is 'Incomes', with a sub-heading 'CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE'. Below the heading, there are two buttons: 'Edit' (highlighted with a red arrow) and 'Goto Assets >>'. The main content area is divided into two columns for Client One and Client Two. Each column has sections for 'Wages/Income', 'Social security', and 'Pensions'. Each section has input fields for 'Current income (if still working)', 'Expected wage increase while working %', 'At age', 'Projected benefits', 'OR Current benefit if already retired', and 'Expected COLA increase %'. The 'Expected COLA increase %' field is set to '0.0'.

Step 2: Monthly/Yearly Amounts: Click on which radio button you would like to enter the data for, monthly or yearly. The default is set at yearly amounts.

The screenshot shows the 'Incomes' page with the 'Edit' button clicked. The 'Enter monthly amounts' radio button is unselected, and the 'Enter yearly amounts' radio button is selected (indicated by a red arrow). The main content area is divided into two columns for Client One and Client Two. Each column has sections for 'Wages/Income', 'Social security', and 'Pensions'. Each section has input fields for 'Current income (if still working)', 'Expected wage increase while working %', 'At age', 'Projected benefits', 'OR Current benefit if already retired', and 'Expected COLA increase %'. The 'Expected COLA increase %' field is set to '0.0'.

Step 3: Wages/Income: Select the amounts you would like to use for filtering data in the wages/income section. The column on the left corresponds to Client One, while the column on the right corresponds to Client Two. If a client does not provide a wage increase, use any percentage you prefer.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Incomes

☐ 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		Projected benefits	unknown	
	67			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 4: Social Security: If your client has not started collecting Social Security, enter a single numerical value into the Projected Benefits column. Once you click Save, SIPS will automatically populate the remaining projected benefits. If your client is already retired and collecting Social Security, enter the numerical amount in the text box corresponding to the client's current age. Enter the numerical value you would like to use for the COLA percentage.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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Incomes

☐ 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 %		175,000	Expected wage increase while working %		0.0
		2.2			0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	unknown	
	67			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 5: Pensions: If your client is collecting a pension, start by entering data into the text box labeled Projected Benefit. Input the client's age and type in the yearly amount. If your client is already retired and receiving their pension, enter the numerical amount. Then, input the numerical value you would like to use for the COLA percentage.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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Incomes

[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
	175,000				
Expected wage increase while working %	2.2		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	62	
	67	36,000		unknown	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	2.5		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 6: Save: Click on the green Save button underneath the Incomes heading. If you need to edit any data, click on the green edit button under the Incomes heading.

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PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
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☐ Enter monthly amounts ☒ Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	175,000				
Expected wage increase while working %	2.2		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	62	
	67	36,000		unknown	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	2.5		Expected COLA increase %	0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	48,000	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 7: Goto Asset: To continue to the Assets page click on the green GoTo Assets button underneath the Incomes heading.

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

☐ Enter monthly amounts ☒ Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	\$175,000				
Expected wage increase while working %	2.2		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	\$25,200	Projected benefits	62	
	67	\$36,000		unknown	
	70	\$44,640		70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	2.5		Expected COLA increase %	0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	\$48,000	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	

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
