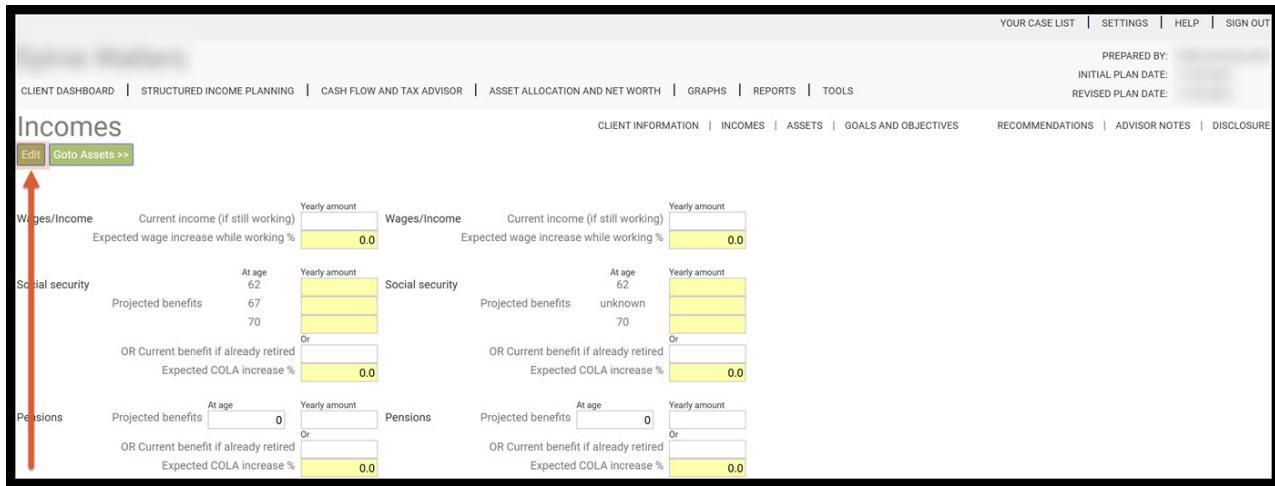


# Incomes

01/09/2026 11:33 am EST

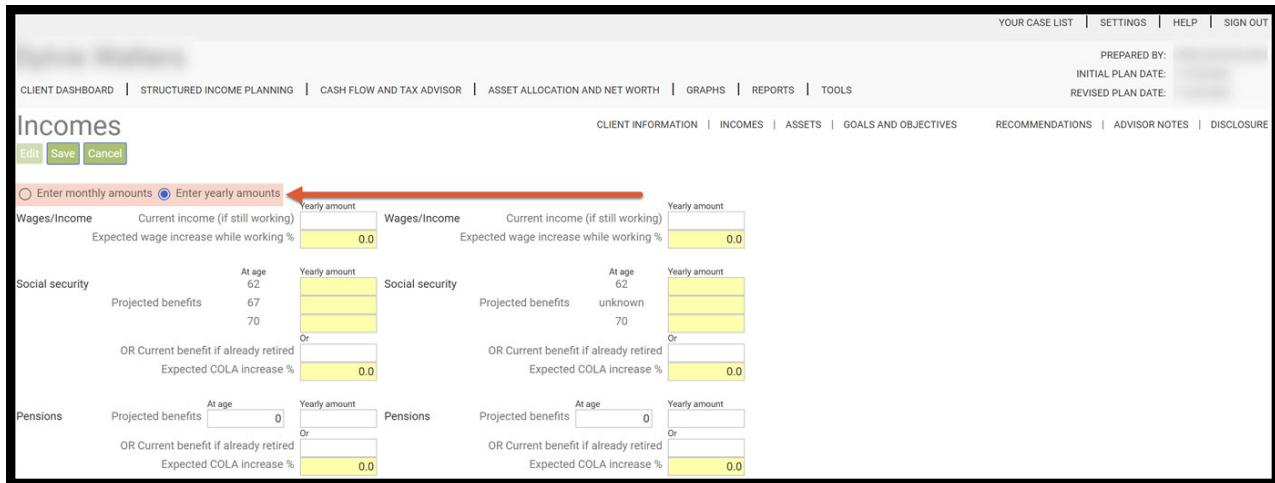
Within the Client Dashboard, the Income page is where you can enter the client's income information. Below is a step-by-step guide for entering data into the Incomes page.

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



The screenshot shows the 'Incomes' page with the 'Edit' button highlighted by a red arrow. The page displays income information for two clients, Client One and Client Two, under categories: Wages/Income, Social security, and Pensions. Each category has fields for current income, projected benefits, and COLA increase percentages. The 'Edit' button is located at the top left of the page.

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 'Enter yearly amounts' radio button selected, indicated by a red arrow. The page layout is identical to the previous screenshot, showing income information for two clients with fields for current income, projected benefits, and COLA increase percentages. The 'Edit' button is now at the top left, and the 'Save' and 'Cancel' buttons are visible at the bottom left.

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.

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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
	Expected wage increase while working %	0.0		Expected wage increase while working %	0.0

Social security

At age 62	Yearly amount	Social security	At age 62	Yearly amount
Projected benefits 67		Projected benefits unknown		
70		70		

OR Current benefit if already retired

Expected COLA increase %	0.0
--------------------------	-----

Pensions

Projected benefits At age 0	Yearly amount	Pensions	Projected benefits At age 0	Yearly amount
Or		Or		

OR Current benefit if already retired

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.

[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 %	2.2		Expected wage increase while working %	0.0

Social security

At age 62	Yearly amount	Social security	At age 62	Yearly amount
Projected benefits 67		Projected benefits unknown		
70		70		

OR Current benefit if already retired

Expected COLA increase %	0.0
--------------------------	-----

Pensions

Projected benefits At age 0	Yearly amount	Pensions	Projected benefits At age 0	Yearly amount
Or		Or		

OR Current benefit if already retired

Expected COLA increase %	0.0
--------------------------	-----

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

Social security

At age 62	Yearly amount	Social security	At age 62	Yearly amount
Projected benefits 67		Projected benefits unknown		
70		70		

OR Current benefit if already retired

Expected COLA increase %	0.0
--------------------------	-----

Pensions

Projected benefits At age 0	Yearly amount	Pensions	Projected benefits At age 0	Yearly amount
Or		Or		

OR Current benefit if already retired

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.

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### Incomes

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

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	175,000	Wages/Income	Current income (if still working)	Yearly amount	0.0				
	Expected wage increase while working %		2.2		Expected wage increase while working %		0.0				
Social security	At age	62	Yearly amount		Social security	At age	62	Yearly amount			
	Projected benefits	67	Yearly amount	36,000		Projected benefits	unknown	Yearly amount			
		70	Or				70	Or			
	OR Current benefit if already retired		OR Current benefit if already retired			OR Current benefit if already retired		Expected COLA increase %			
	Expected COLA increase %	2.5				Expected COLA increase %	0.0				
Pensions	Projected benefits	At age	0	Yearly amount		Pensions	Projected benefits	At age	0	Yearly amount	
		Or						Or			
	OR Current benefit if already retired		OR Current benefit if already retired				Expected COLA increase %		Expected COLA increase %		0.0
	Expected COLA increase %	0.0									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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### Incomes

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

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	175,000	Wages/Income	Current income (if still working)	Yearly amount	0.0				
	Expected wage increase while working %		2.2		Expected wage increase while working %		0.0				
Social security	At age	62	Yearly amount		Social security	At age	62	Yearly amount			
	Projected benefits	67	Yearly amount	36,000		Projected benefits	unknown	Yearly amount			
		70	Or				70	Or			
	OR Current benefit if already retired		OR Current benefit if already retired			OR Current benefit if already retired		Expected COLA increase %			
	Expected COLA increase %	2.5				Expected COLA increase %	0.0				
Pensions	Projected benefits	At age	65	Yearly amount	48,000	Pensions	Projected benefits	At age	0	Yearly amount	
		Or						Or			
	OR Current benefit if already retired		OR Current benefit if already retired			Expected COLA increase %		Expected COLA increase %			0.0
	Expected COLA increase %	0.0									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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### Incomes

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

Enter monthly amounts  Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	175,000	Wages/Income	Current income (if still working)	Yearly amount	0.0				
	Expected wage increase while working %		2.2		Expected wage increase while working %		0.0				
Social security	At age	62	Yearly amount		Social security	At age	62	Yearly amount			
	Projected benefits	67	Yearly amount	\$25,200		Projected benefits	unknown	Yearly amount			
		70	Or	\$36,000			70	Or			
	OR Current benefit if already retired		OR Current benefit if already retired	\$44,640			OR Current benefit if already retired		Expected COLA increase %		
	Expected COLA increase %	2.5					Expected COLA increase %	0.0			
Pensions	Projected benefits	At age	65	Yearly amount	\$48,000	Pensions	Projected benefits	At age	0	Yearly amount	
		Or						Or			
	OR Current benefit if already retired		OR Current benefit if already retired			Expected COLA increase %		Expected COLA increase %			0.0
	Expected COLA increase %	0.0									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](mailto:support@planscout.com)

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