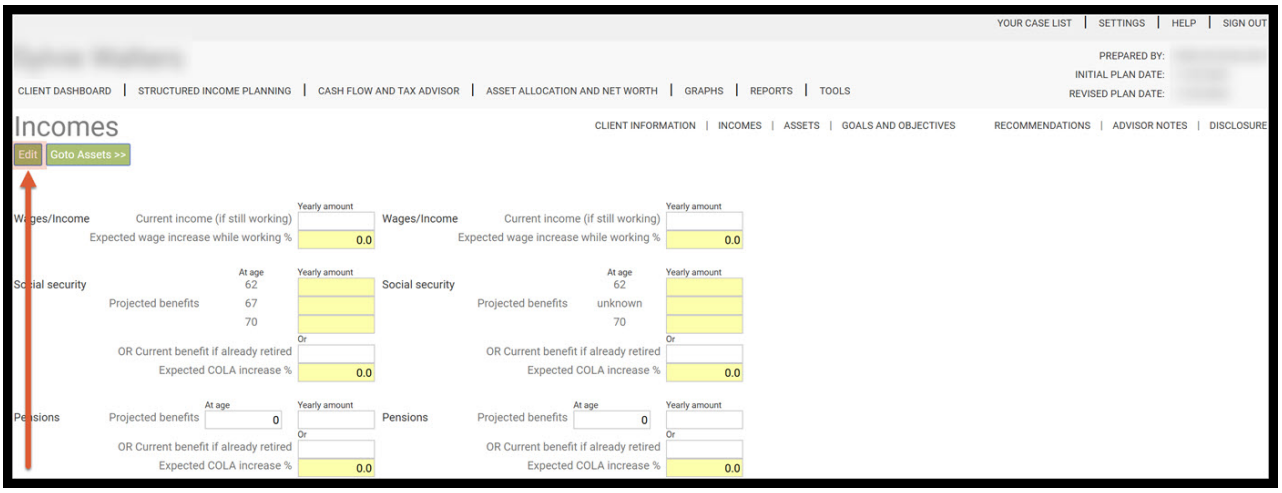
Incomes

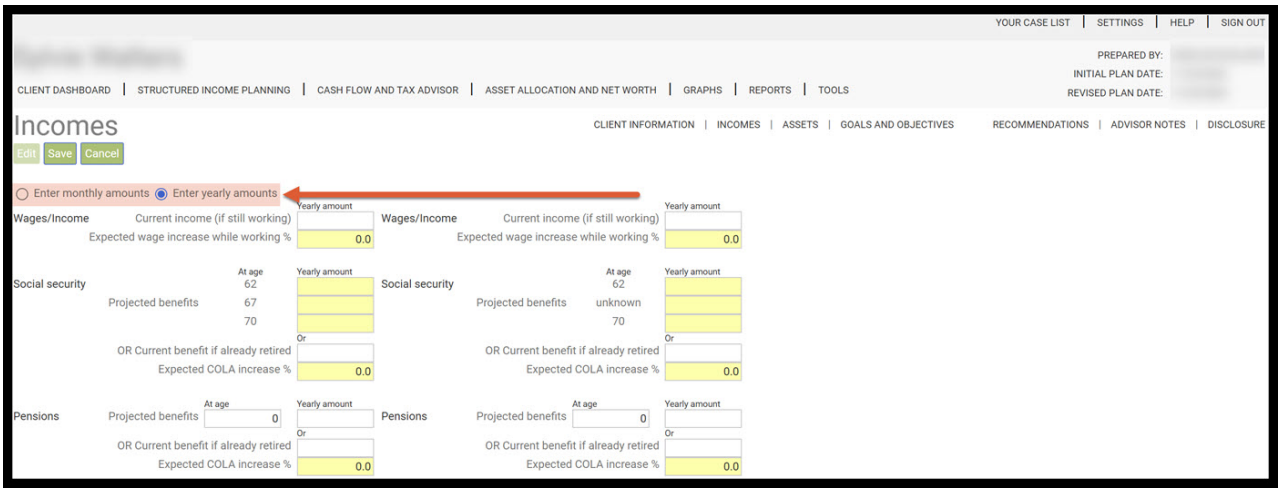
11/22/2024 8:04 pm EST

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.

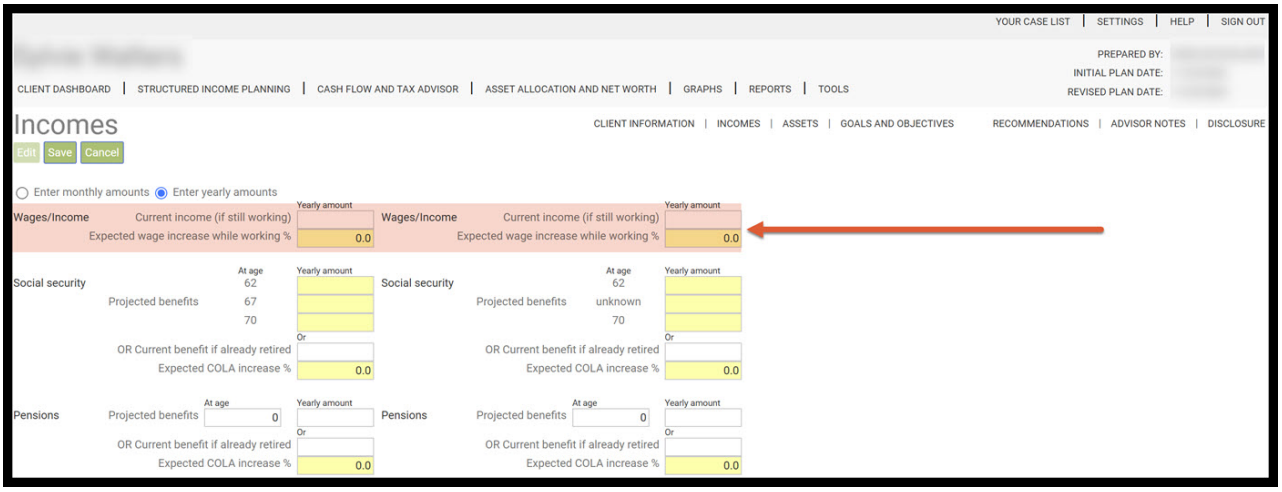
Step 1: Edit: Click on the edit button below the Incomes heading.



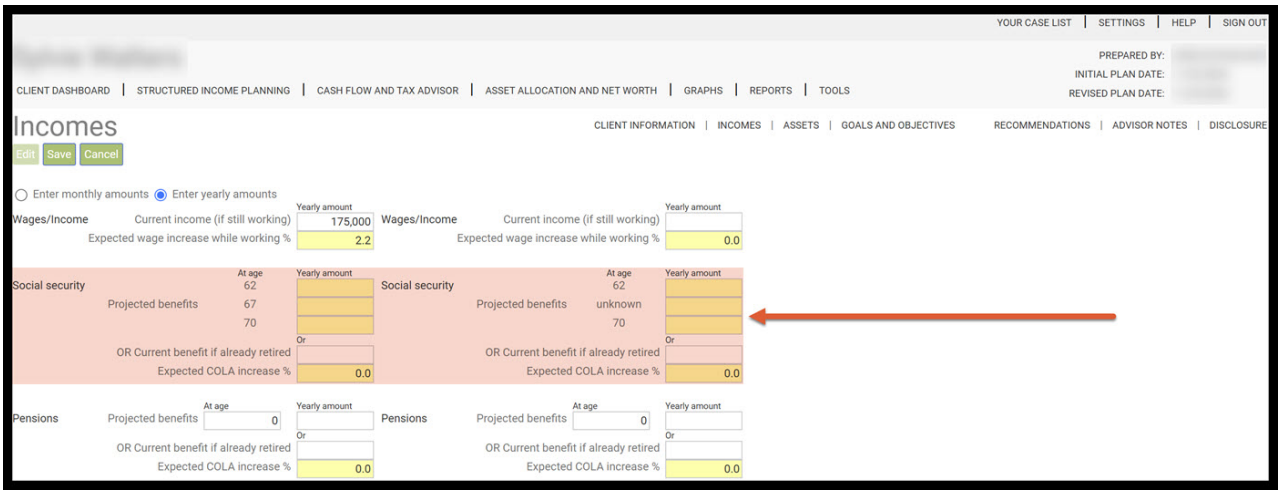
Step 2:Monthly/Yearly Amounts: Click on which radio button you would like to enter the data for, monthly or yearly. The default is set at yearly amounts.



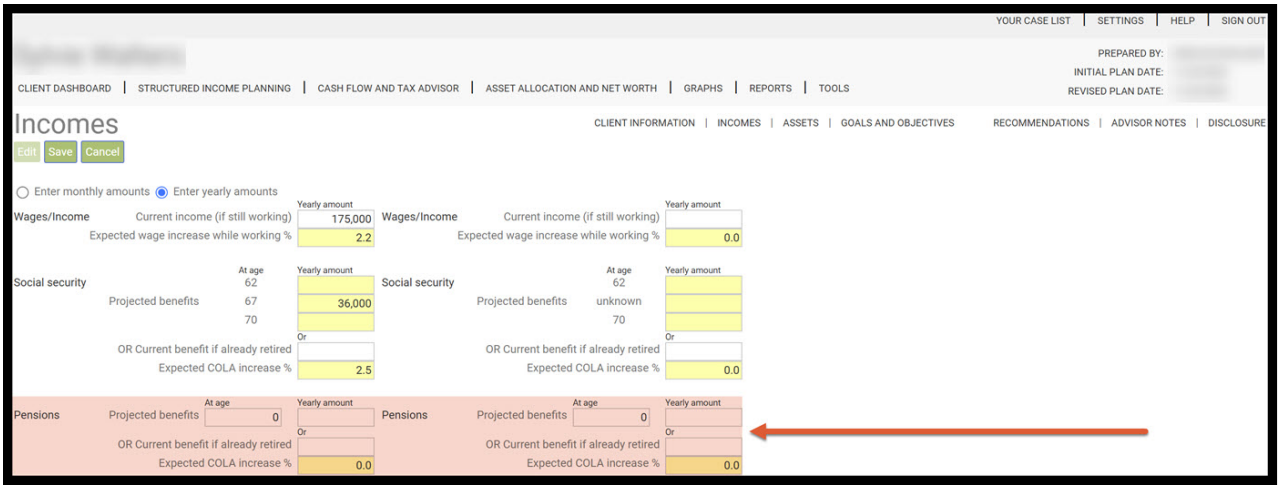
Step 3: Wages/Income: Select the amounts you would like to use for filtering data in the wages/income section. The column on the left corresponds to Client One, while the column on the right corresponds to Client Two. If a client does not provide a wage increase, use any percentage you prefer.



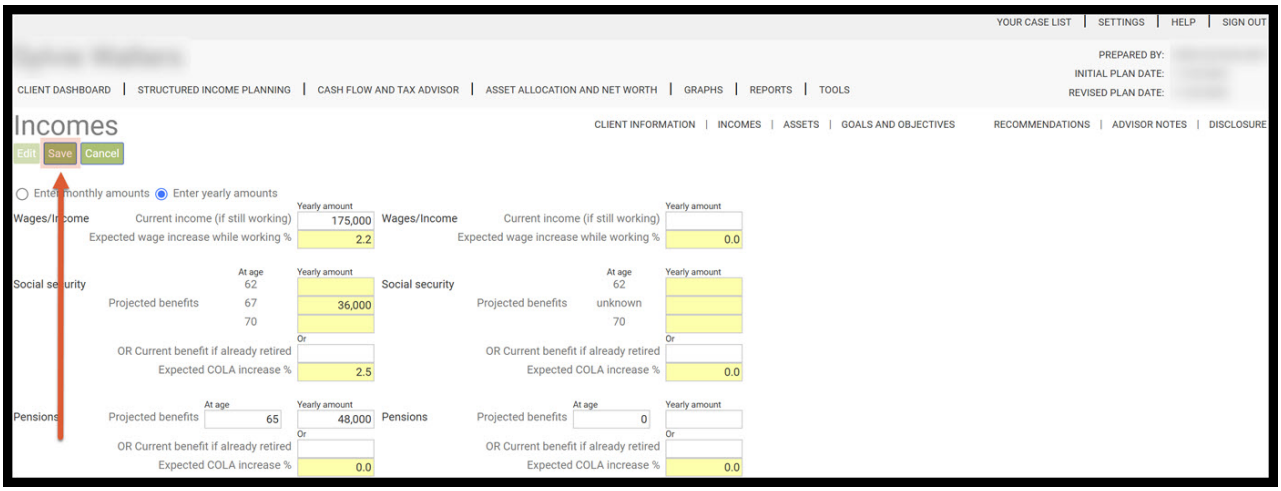
Step 4: Social Security: If your client has not started collecting Social Security, enter a single numerical value into the Projected Benefits column. Once you click Save, SIPS will automatically populate the remaining projected benefits. If your client is already retired and collecting Social Security, 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.



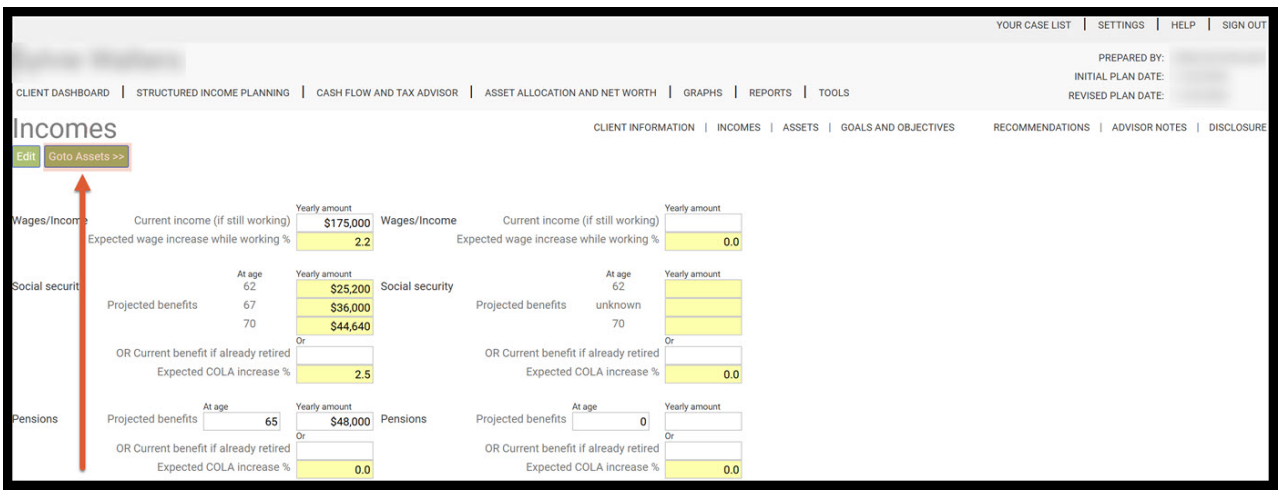
Step 5: Pensions: If your client is collecting a pension, start by entering data into the text box labeld Projected Benefit. Input the client's age and type in the yearly amount. If your client is already retired and receiving their pension, enter the numerical amount. Then, input the numerical value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



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.



Step 7: Goto Asset: To continue to the Assets page click on the green GoTo Assets button underneath the Incomes heading.



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