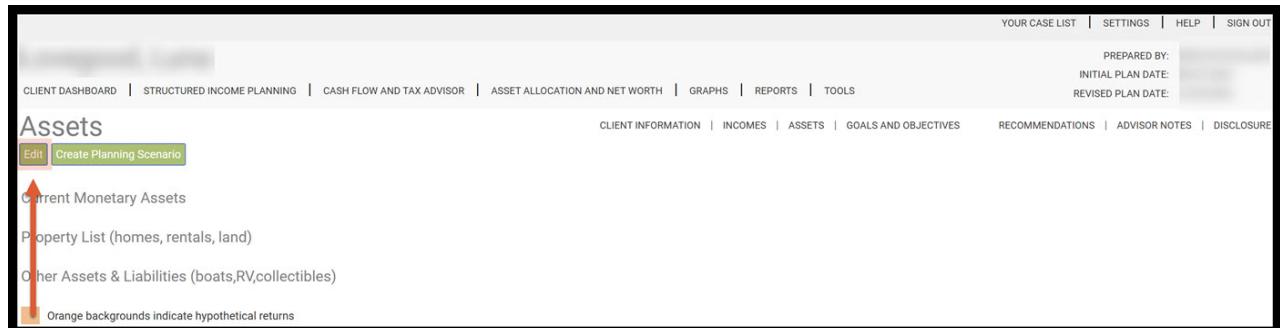


Assets

01/09/2026 11:35 am EST

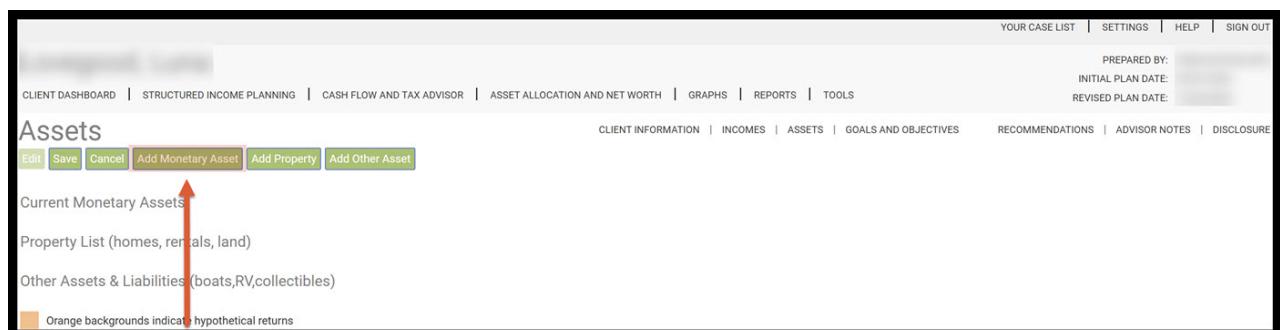
Below is a step-by-step guideline for entering assets into the structured income plan.

Step 1: Edit: Click on the green edit button underneath the Assets subheading.



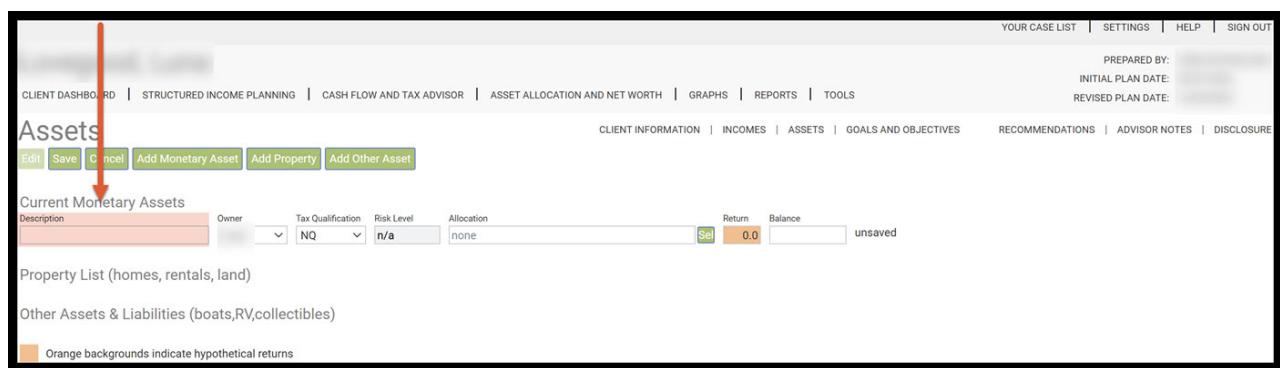
The screenshot shows the 'Assets' section of a financial planning software. At the top, there are navigation links for 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are links for 'PREPARED BY', 'INITIAL PLAN DATE', and 'REVISED PLAN DATE'. Below the navigation, there are tabs for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The 'ASSETS' tab is selected. A sub-section titled 'Assets' contains buttons for 'Edit' (highlighted with a red arrow), 'Create Planning Scenario', 'Current Monetary Assets', 'Property List (homes, rentals, land)', and 'Other Assets & Liabilities (boats, RV, collectibles)'. A note at the bottom states: 'Orange backgrounds indicate hypothetical returns'.

Step 2: Add Monetary Asset: Click on the green Add Monetary Asset button underneath the Asset subheading. If your client does not have any monetary asset, click on the green Add Property or the green Add Other Asset button to continue.



The screenshot shows the 'Assets' section with the 'Edit' button selected. Below it, there are buttons for 'Save', 'Cancel', 'Add Monetary Asset' (highlighted with a red arrow), 'Add Property', and 'Add Other Asset'. The sub-section 'Assets' contains the same buttons as the previous screenshot: 'Current Monetary Assets', 'Property List (homes, rentals, land)', and 'Other Assets & Liabilities (boats, RV, collectibles)'. The note at the bottom is the same: 'Orange backgrounds indicate hypothetical returns'.

Step 3: Current Monetary Assets - Description: Type in the title for the monetary asset.



The screenshot shows the 'Assets' section with the 'Edit' button selected. The 'Current Monetary Assets' sub-section is active. A red arrow points to the 'Description' input field, which is highlighted with a red background. Below it are dropdown menus for 'Owner' (with options 'n/a' and 'n/a'), 'Tax Qualification' (with option 'n/a'), 'Risk Level' (with option 'n/a'), and 'Allocation' (with option 'none'). To the right are buttons for 'Return' (with value '0.0') and 'Balance' (with value 'unsaved'). The note at the bottom is the same: 'Orange backgrounds indicate hypothetical returns'.

Step 4: Owner: Click on the drop-down carrot arrow and select the owner of the monetary asset account.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account	<input type="button" value="▼"/>	NQ	n/a	none	<input type="button" value="Sel"/>	0.0

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 5: Tax Qualification: Click on the drop-down carrot arrow and select the tax qualification of the monetary asset account.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account	<input type="button" value="▼"/>	NQ	n/a	none	<input type="button" value="Sel"/>	0.0

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 6: Risk Level/Allocation: The risk level is grayed out as it corresponds to the selected allocation level. Click the "Sel" button to choose the allocation level for the monetary account.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account	<input type="button" value="▼"/>	NQ	n/a	none	<input type="button" value="Sel"/>	0.0

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 7: Return: Enter in the percentage amount of the rate of return for the monetary account.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
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Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings Account		NQ	Cons	Conservative	Sel	0.0	Del

Property List (homes, rentals, land)

Other Assets & Liabilities (boats, RV, collectibles)

Orange backgrounds indicate hypothetical returns

Step 8: Balance: Click on the balance text box and enter in the monetary amount. Repeat steps 2 through 8 if you have more than one monetary asset.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings Account		NQ	Cons	Conservative	Sel	1	Del

Property List (homes, rentals, land)

Other Assets & Liabilities (boats, RV, collectibles)

Orange backgrounds indicate hypothetical returns

Step 9: Add Property: Click on the green Add Property button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance		
Checking/Savings Account		NQ	Cons	Conservative	Sel	1.0	\$25,000	Del
Roth IRA		NQ	Mod	Moderate	Sel	3.0	\$500,000	Del
401(k)		NQ	Aggr	Aggressive	Sel	6	750,000	Del

Property List (homes, rentals, land)

Other Assets & Liabilities (boats, RV, collectibles)

Orange backgrounds indicate hypothetical returns

Step 10: Property List (home, rentals, land)-Description: Type in the title for the property.

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Assets

Edit | Save | Cancel | Add Monetary Asset | Add Property | Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account		NQ	Cons	Conservative	Se 1.0	\$25,000 Del
Roth IRA		NQ	Mod	Moderate	Se 3.0	\$500,000 Del
401(k)		NQ	Aggr	Aggressive	Se 6.0	\$750,000 Del

Property List (homes, rentals, land)

Description	Value	Amount owed	unsaved
-------------	-------	-------------	---------

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 11: Value: Type in the monetary amount for the value.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit | Save | Cancel | Add Monetary Asset | Add Property | Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account	Luna	NQ	Cons	Conservative	Se 1.0	\$25,000 Del
Roth IRA	Luna	NQ	Mod	Moderate	Se 3.0	\$500,000 Del
401(k)	Luna	NQ	Aggr	Aggressive	Se 6.0	\$750,000 Del

Property List (homes, rentals, land)

Description	Value	Amount owed	unsaved
-------------	-------	-------------	---------

Residential

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 12: Amount Owed: Type in the monetary amount owed to the property if there is an amount owed. Repeat steps 10 through 12 if you have more than one property asset.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
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Assets

Edit | Save | Cancel | Add Monetary Asset | Add Property | Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account		NQ	Cons	Conservative	Se 1.0	\$25,000 Del
Roth IRA		NQ	Mod	Moderate	Se 3.0	\$500,000 Del
401(k)		NQ	Aggr	Aggressive	Se 6.0	\$750,000 Del

Property List (homes, rentals, land)

Description	Value	Amount owed	unsaved
-------------	-------	-------------	---------

Residential 500,000

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 13: Add Other Asset: Click on the green Add Other Asset button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit | Save | Cancel | Add Monetary Asset | Add Property | Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000

Property List (homes, rentals, land)

Description	Value	Amount owed
Residential	500,000	Amount owed

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 14: Other Assets & Liabilities (boats, RV, collectibles) Description: Type in the title for the other assets.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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Assets

Edit | Save | Cancel | Add Monetary Asset | Add Property | Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000

Property List (homes, rentals, land)

Description	Value	Amount owed
Residential	\$500,000	\$100,000

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed
Boats	Value	Amount owed

Orange backgrounds indicate hypothetical returns

Step 15: Value: Type in the monetary amount for the value.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

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Assets

Edit | Save | Cancel | Add Monetary Asset | Add Property | Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000

Property List (homes, rentals, land)

Description	Value	Amount owed
Residential	\$500,000	\$100,000

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed
Boats	Value	Amount owed

Orange backgrounds indicate hypothetical returns

Step 16: Amount Owed: Type in the monetary amount owed to the property if there is an amount owed. Repeat steps 14 through 16 if you have more than one property asset.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
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Assets

[Edit](#) [Save](#) [Cancel](#) [Add Monetary Asset](#) [Add Property](#) [Add Other Asset](#)

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings Account	Luna	NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA	Luna	NQ	Mod	Moderate	3.0	\$500,000	Del
401(k)	Luna	NQ	Aggr	Aggressive	6.0	\$750,000	Del

Property List (homes, rentals, land)

Description	Value	Amount owed	
Residential	\$500,000	\$100,000	Del

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed	
Boat	25,000		unsaved

Orange backgrounds indicate hypothetical returns

Step 17: Save: Click on the Green Save button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

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Assets

[Edit](#) [Save](#) [Cancel](#) [Add Monetary Asset](#) [Add Property](#) [Add Other Asset](#)

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings Account	Luna	NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA	Luna	NQ	Mod	Moderate	3.0	\$500,000	Del
401(k)	Luna	NQ	Aggr	Aggressive	6.0	\$750,000	Del

Property List (homes, rentals, land)

Description	Value	Amount owed	
Residential	\$500,000	\$100,000	Del

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed	
Boat	25,000		unsaved

Orange backgrounds indicate hypothetical returns

Step 18: Edit: Click on the green Edit button underneath the Assets subheading if you need to make an edit.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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

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Assets

[Edit](#) [Create Planning Scenario](#)

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings Account	Luna	NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA	Luna	NQ	Mod	Moderate	3.0	\$500,000	Del
401(k)	Luna	NQ	Aggr	Aggressive	6.0	\$750,000	Del

Property List (homes, rentals, land)

Description	Value	Amount owed
Residential	\$500,000	\$100,000

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed
Boat	\$25,000	

Orange backgrounds indicate hypothetical returns

Step 19: Delete: To delete an item, click on the green Del button located at the righthand side of the screen.

Assets

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	Del
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000	Del
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000	Del

Property List (homes, rentals, land)

Description	Value	Amount owed	Del
Residential	\$500,000	\$100,000	Del

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed	Del
Boat	\$25,000		Del

Orange backgrounds indicate hypothetical returns

Step 20: Permanent Deletion: After clicking the green Del button, a sipsplanning.net dialog box will appear asking, "Are you sure you would like to permanently delete this recommendation?" Click OK to confirm the permanent deletion.

Assets

www.sipsplanning.net says

Are you sure you would like to permanently delete this account?

OK Cancel

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	Del
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000	Del
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000	Del

Property List (homes, rentals, land)

Description	Value	Amount owed	Del
Residential	\$500,000	\$100,000	Del

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed	Del
Boat	\$25,000		Del

Orange backgrounds indicate hypothetical returns

Step 21: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Assets subheading.

Assets

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	Del
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000	Del
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000	Del

Property List (homes, rentals, land)

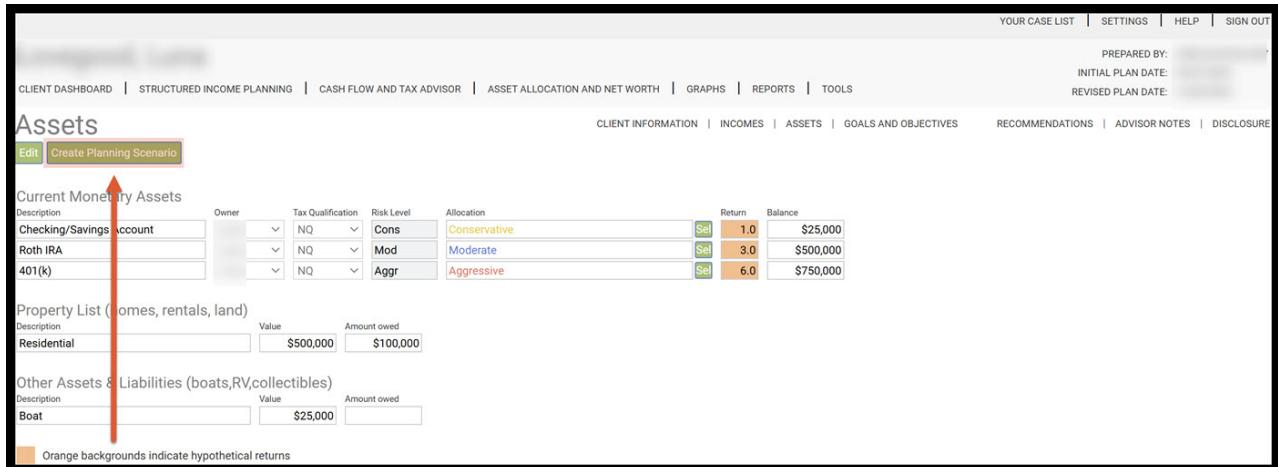
Description	Value	Amount owed	Del
Residential	\$500,000	\$100,000	Del

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed	Del
Boat	\$25,000		Del

Orange backgrounds indicate hypothetical returns

Step 22: Create Planning Scenario: Click on the green Create Planning Scenario underneath the Assets subheading.



The screenshot shows the 'Assets' section of the PlanScout software. At the top, there are navigation links: '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', and 'DISCLOSURE'. On the right, there are fields for 'PREPARED BY', 'INITIAL PLAN DATE', and 'REVISED PLAN DATE'. The 'ASSETS' section is titled 'Assets' and contains three sub-sections: 'Current Monetary Assets', 'Property List (homes, rentals, land)', and 'Other Assets & Liabilities (boats, RV, collectibles)'. Each sub-section has a table with columns for 'Description', 'Owner', 'Tax Qualification', 'Risk Level', 'Allocation', 'Return', and 'Balance'. An orange arrow points to the 'Create Planning Scenario' button, which is highlighted with a red border. A note at the bottom states: 'Orange backgrounds indicate hypothetical returns'.

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Checking/Savings Account		NQ	Cons	Conservative	1.0	\$25,000
Roth IRA		NQ	Mod	Moderate	3.0	\$500,000
401(k)		NQ	Aggr	Aggressive	6.0	\$750,000

Description	Value	Amount owed
Residential	\$500,000	\$100,000

Description	Value	Amount owed
Boat	\$25,000	

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.