Editing the Social Security Age

09/16/2024 11:23 am EDT

On the structured income planning page, you have the ability to edit the start age for social security disbursements. Below is a step-by-step guide for editing the age to start social security.



Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.

Step 2: Manage: Click on the green Manage button that is located in the Income column for the social security.

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Step 3: Age to Begin Income: Highlight the numeric number in the text box, delete the number and type in the new age you would like to social security amounts to start in.

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Step 4: Save: Click on the green Save button underneath the Manage Income subheading.

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Step 5: Structured Income Planning Page: After clicking save the screen should take you back to the Structured Income Planning page.

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Step 6: Saving the Structured Income Planning scenario: Click the green Save button underneath the Structured Income Planning subheading.

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Step 7: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.

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Step 8: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.

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Step 9: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

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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.