Changing the Colors of the Allocation Codes

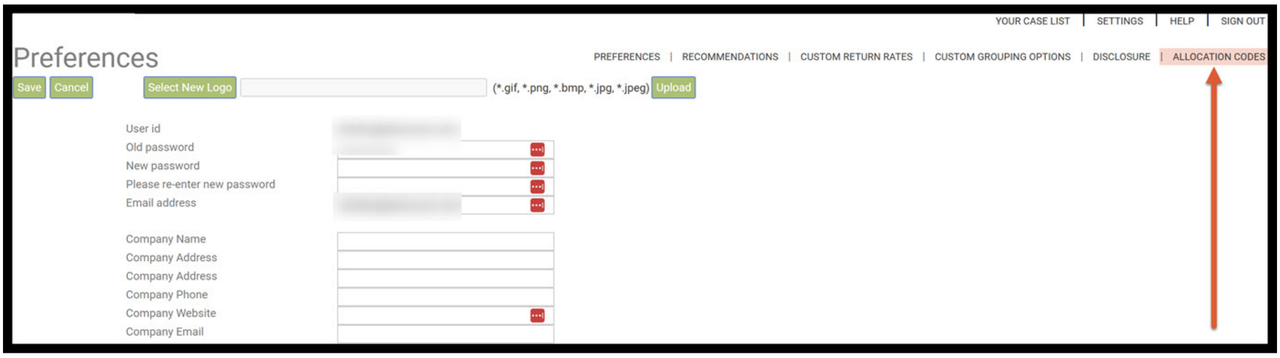
12/09/2024 4:53 pm EST

Underneath the settings subheading you can go to the allocation codes page. On this page you can edit many different items with the allocation codes. Below is a step by step guideline for changing the colors of the allocation codes.

Step 1: Log In: Log in into SIPS.

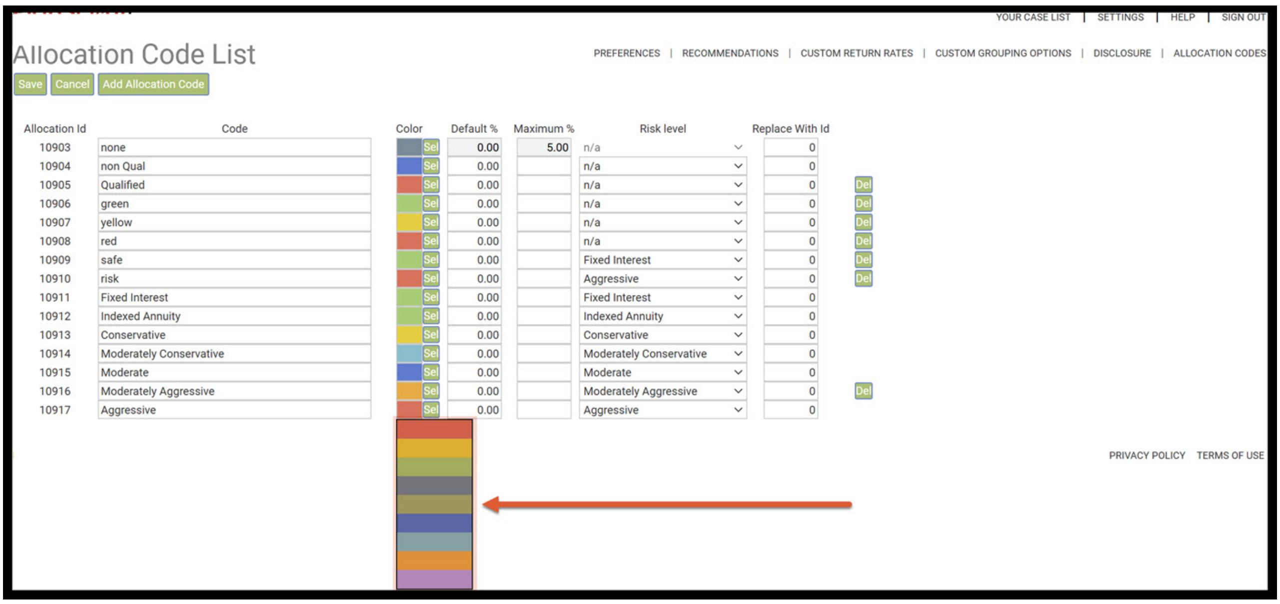
Step 2: Settings: Click on the settings button located on the right hand side of your screen.

Step 3: Allocation Codes: Click on the Allocation codes button on the right-hand side of the screen.

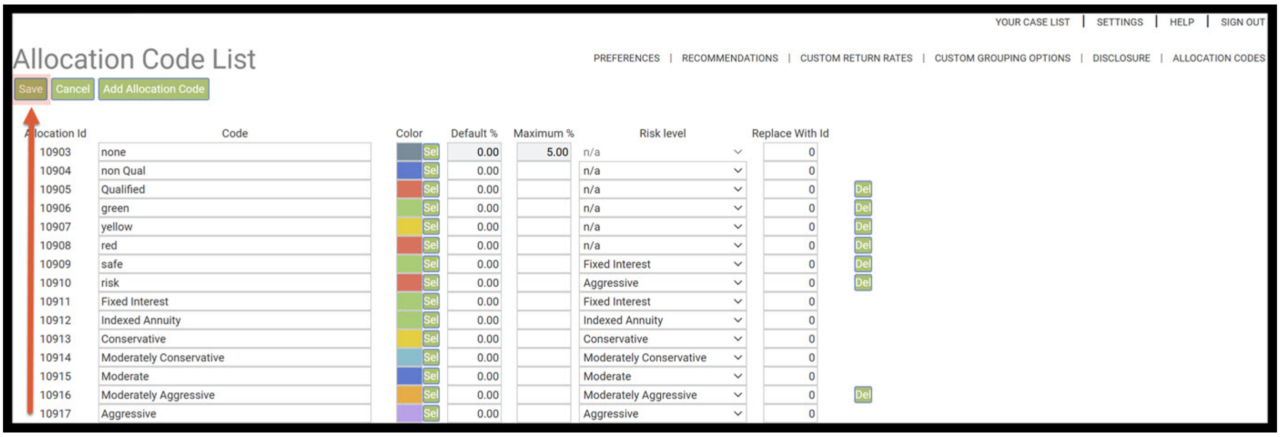


Step 4: Sel: Click on the green Sel button next to code that you would like to change the color for.

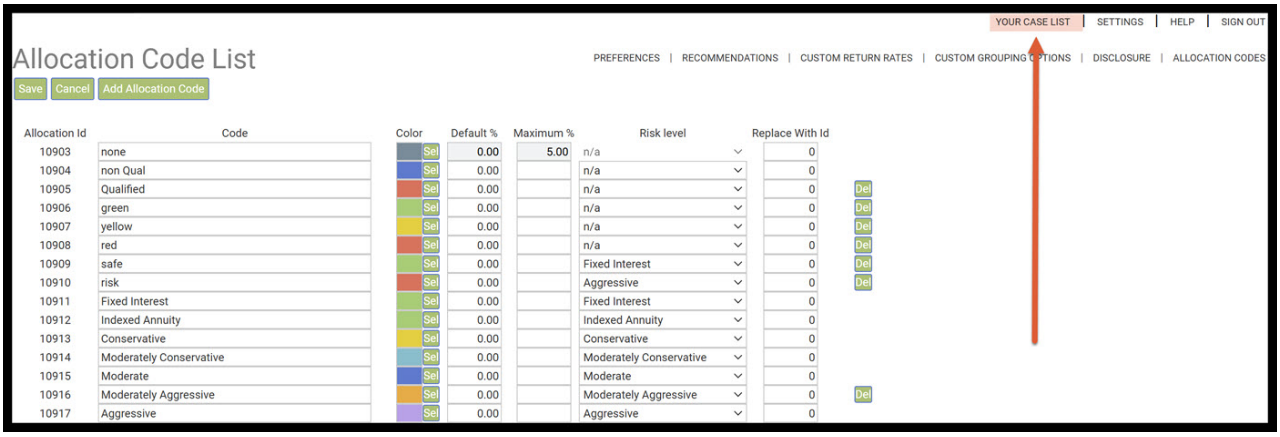
Step 5: Color Selection: Pick which color selection you would like to go with.



Step 6: Save: Click on the green save button underneath the Allocation Code List heading.

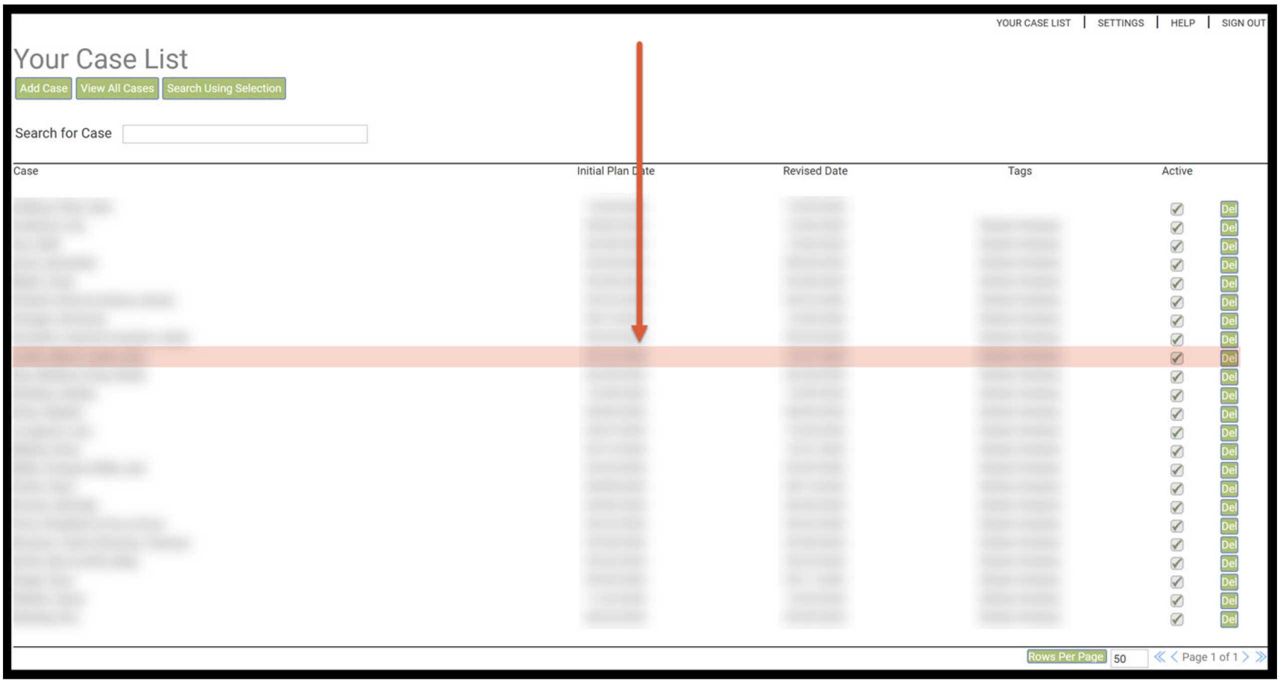


Step 7: Your Case List: Click on the Your Case List button on the right hand side of your screen.

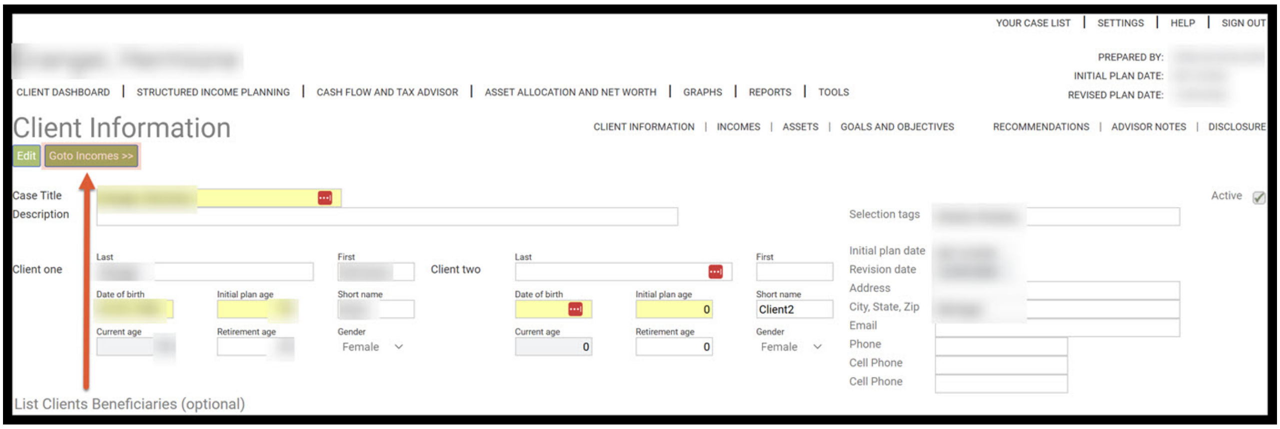


Step 8: View All Cases: Click on the green View All Cases button.

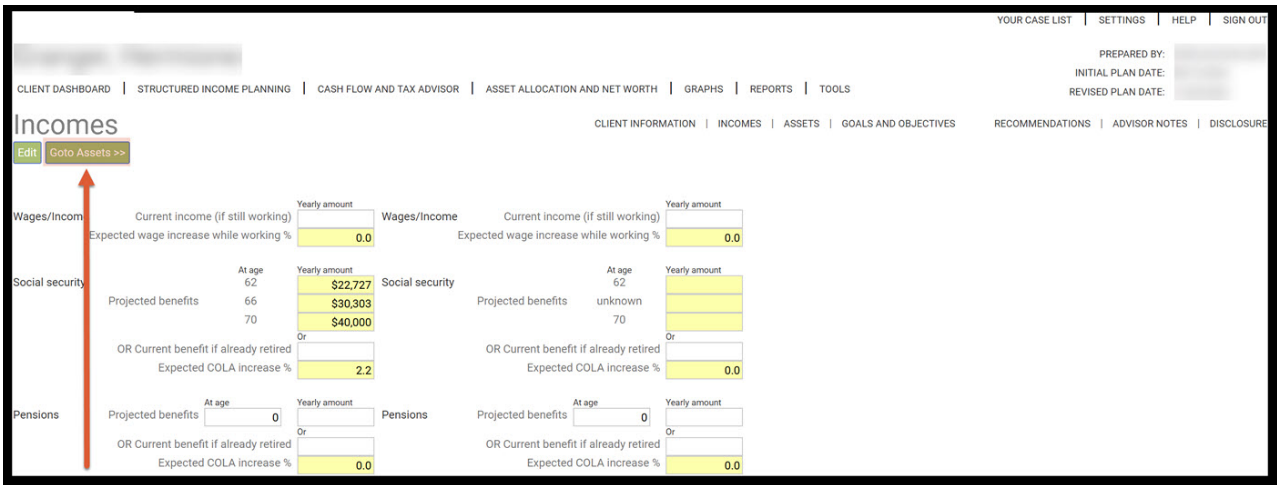
Step 9: Case Selection: Select a case.



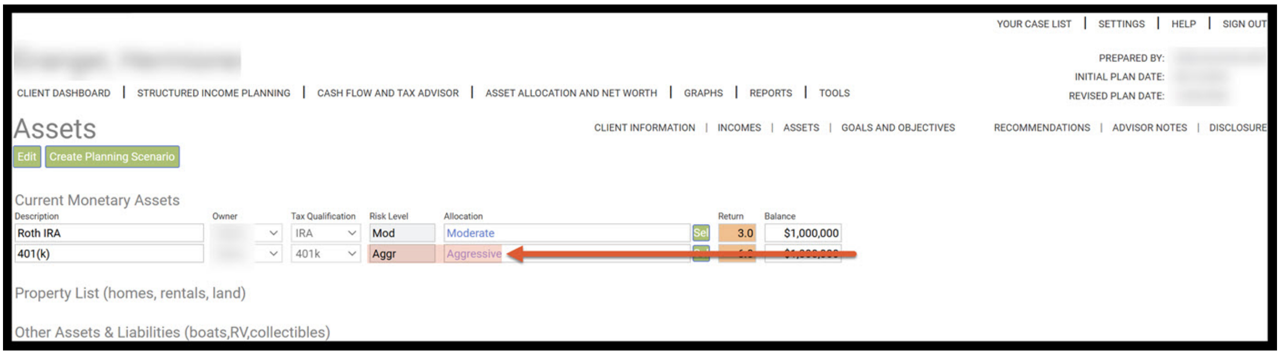
Step 10: GoTo Incomes: Click on the green GoTo Incomes underneath the Client Information heading.



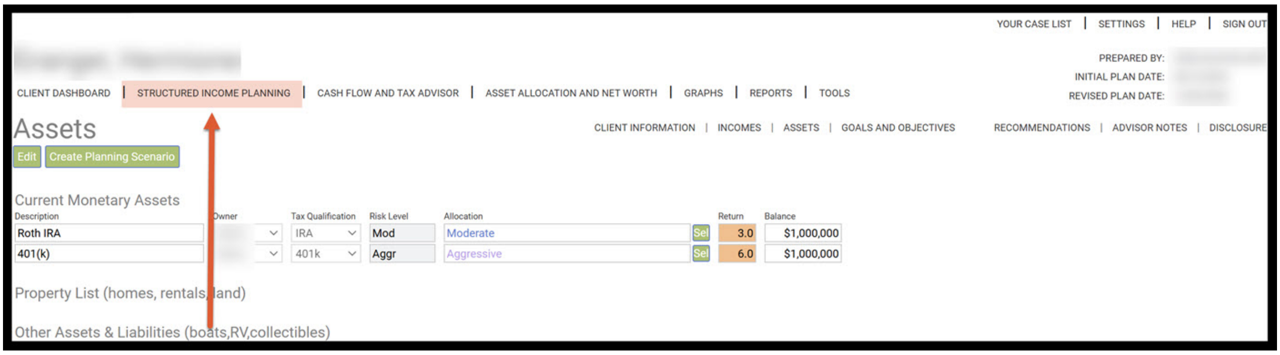
Step 11: GoTo Assets: Click on the green GoTo Assets underneath the Incomes heading.



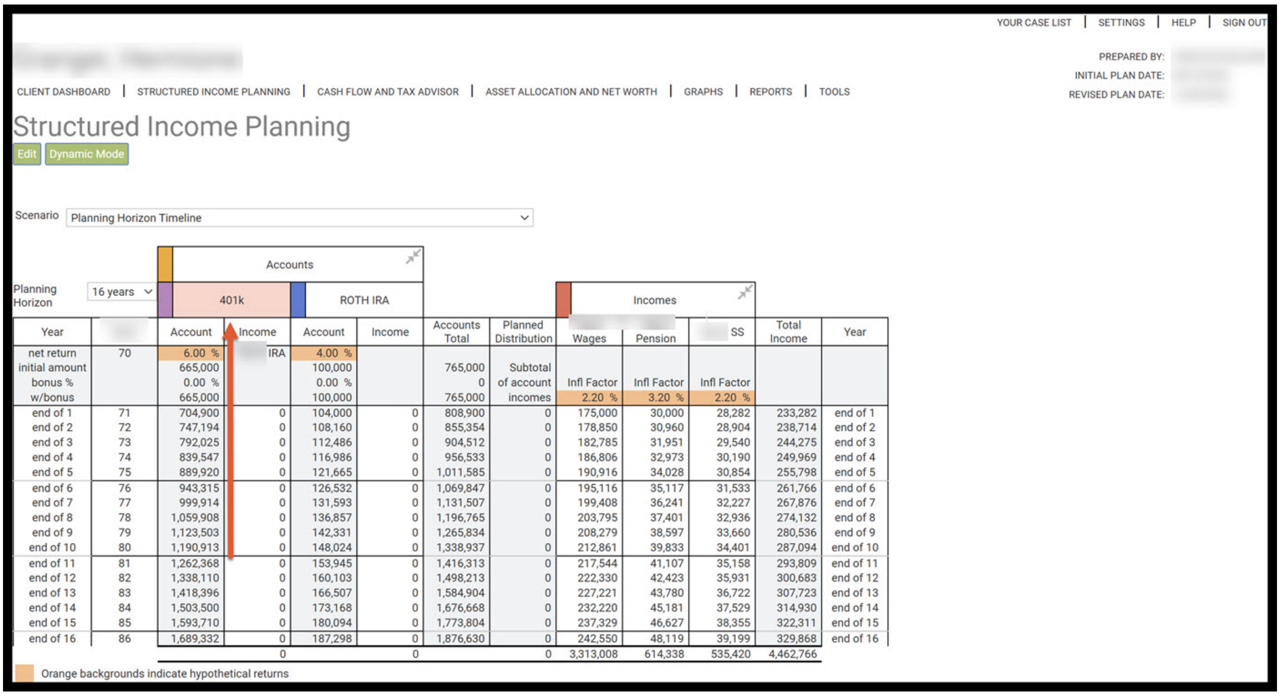
Step 12: Current Monetary Assets Allocation: The Allocation should be written in the color that you have selected.



Step 13: Structured Income Planning: Click on the Structured Income Planning button located on the left-hand side of the screen.



Step 14: Accounts: The Accounts color should be changed to the one you have selection on the Allocation Codes page.



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

Structured Income Planning

Edit Dynamic Mode

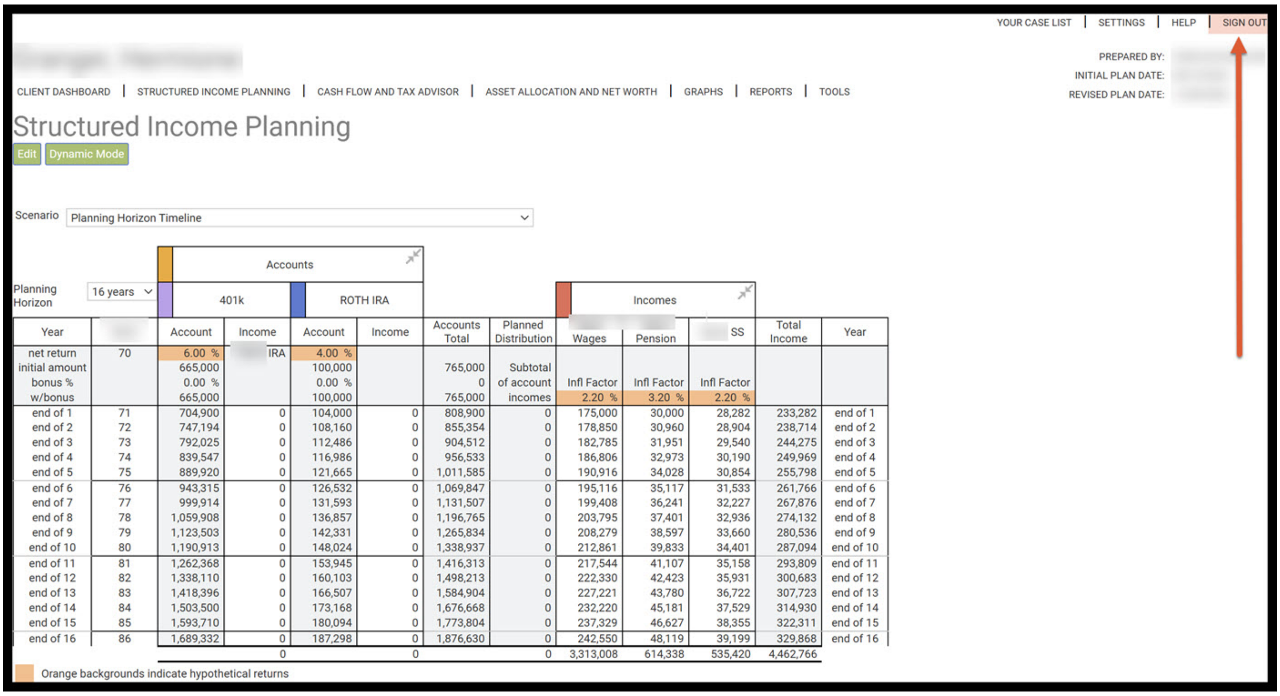
Scenario Planning Horizon Timeline

Planning Horizon 16 years

		Accounts						Incomes				
		401k		ROTH IRA								
Year		Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	Pension	SS	Total Income	Year
net return	70	6.00 %	IRA	4.00 %								
initial amount		665,000		100,000		765,000	Subtotal					
bonus %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor		
w/bonus		665,000		100,000		765,000	incomes	2.20 %	3.20 %	2.20 %		
end of 1	71	704,900	0	104,000	0	808,900	0	175,000	30,000	28,282	233,282	end of 1
end of 2	72	747,194	0	108,160	0	855,354	0	178,850	30,960	28,904	238,714	end of 2
end of 3	73	792,025	0	112,486	0	904,512	0	182,785	31,951	29,540	244,275	end of 3
end of 4	74	839,547	0	116,986	0	956,533	0	186,806	32,973	30,190	249,969	end of 4
end of 5	75	889,920	0	121,665	0	1,011,585	0	190,916	34,028	30,854	255,798	end of 5
end of 6	76	943,315	0	126,532	0	1,069,847	0	195,116	35,117	31,533	261,766	end of 6
end of 7	77	999,914	0	131,593	0	1,131,507	0	199,408	36,241	32,227	267,876	end of 7
end of 8	78	1,059,908	0	136,857	0	1,196,765	0	203,795	37,401	32,936	274,132	end of 8
end of 9	79	1,123,503	0	142,331	0	1,265,834	0	208,279	38,597	33,660	280,536	end of 9
end of 10	80	1,190,913	0	148,024	0	1,338,937	0	212,861	39,833	34,401	287,094	end of 10
end of 11	81	1,262,368	0	153,945	0	1,416,313	0	217,544	41,107	35,158	293,809	end of 11
end of 12	82	1,338,110	0	160,103	0	1,498,213	0	222,330	42,423	35,931	300,683	end of 12
end of 13	83	1,418,396	0	166,507	0	1,584,904	0	227,221	43,780	36,722	307,723	end of 13
end of 14	84	1,503,500	0	173,168	0	1,676,668	0	232,220	45,181	37,529	314,930	end of 14
end of 15	85	1,593,710	0	180,094	0	1,773,804	0	237,329	46,627	38,355	322,311	end of 15
end of 16	86	1,689,332	0	187,298	0	1,876,630	0	242,550	48,119	39,199	329,868	end of 16
			0		0		0	3,313,008	614,338	535,420	4,462,766	

Orange backgrounds indicate hypothetical returns

Step 15: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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w/bonus		665,000		100,000		765,000	incomes	2.20 %	3.20 %	2.20 %		
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			0		0		0	3,313,008	614,338	535,420	4,462,766	

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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