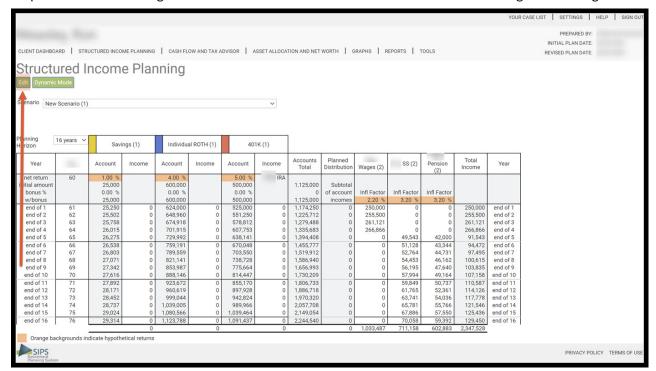
## Adding a Withdrawal to Start at a Specific Age

09/17/2024 1:11 pm EDT

Within the structured income plan, you have the ability to withdraw specific monetary amounts to start at a certain age. Below are the step-by-step guidelines to adding an income to start at a specified age.

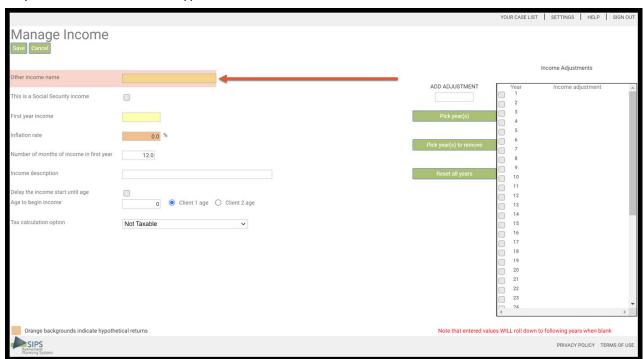
Step 1: Edit: Click on the green Edit button underneath the Structured Income Planning sub-heading.



Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning heading.



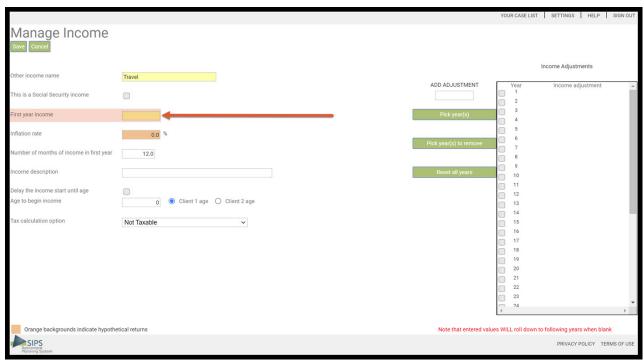
Step 3: Other Income Name: Type in a title for the withdraw.



Step 4: Social Security Income: Leave the box unchecked.



Step 5:First Year Income: Type in the numeric amount of income for the first year. For withdraws the numeric number needs to be written in parentheses.



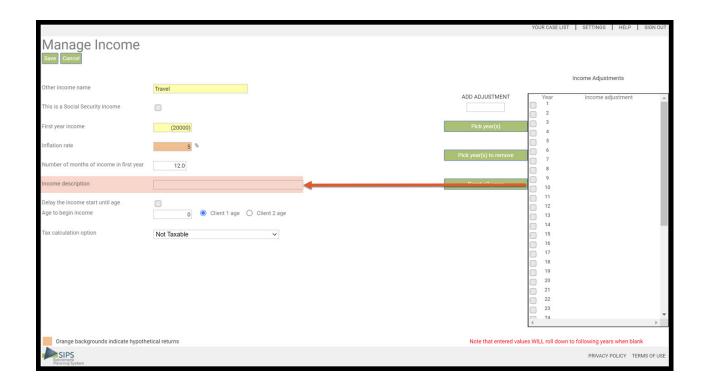
Step 6: Inflation Rate: Type in the inflation rate.



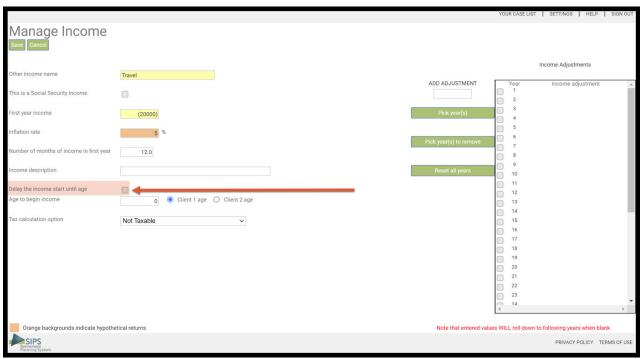
Step 7: Number of Months of Income in First Year: Type in the number of months of withdraw in the first year. The default amount is set a 12.



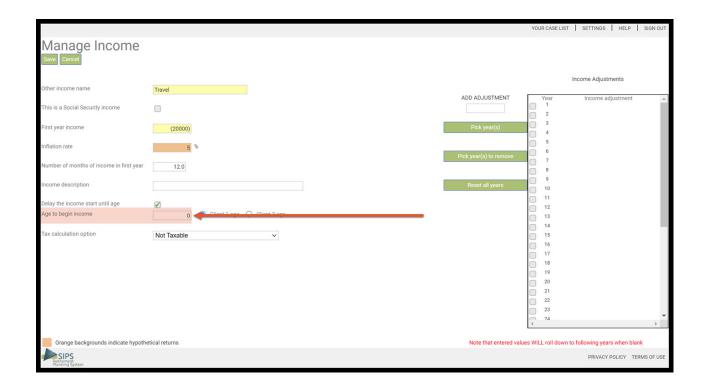
Step 8: Income Description: Type in the withdraw description.



Step 9: Delay the Income Start Until Age: Click on the text box.



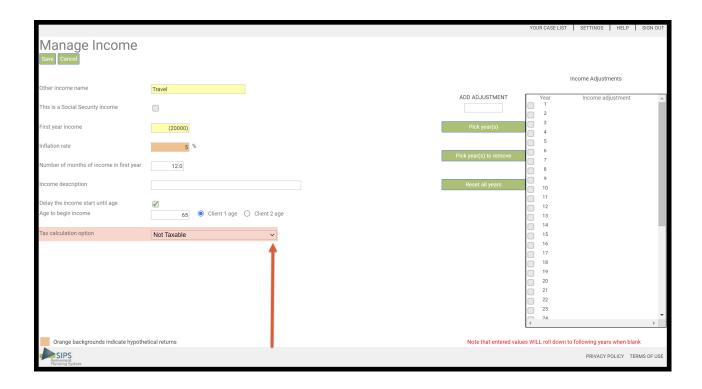
Step 10: Age to Begin Income: Type in the age to begin the withdraw. Default is set to zero, which will start the income in year 1.



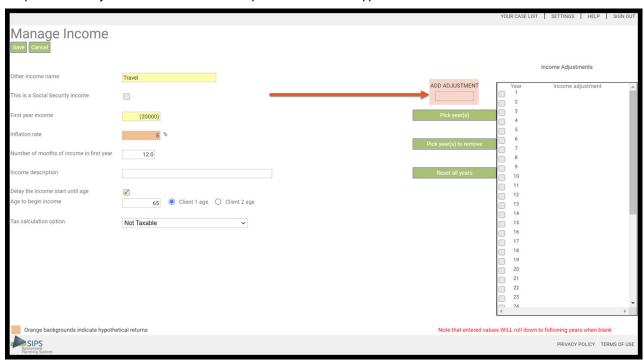
Step 11: Radio Buttons: Click which radio button the income is associated with. The default is set with Client 1.



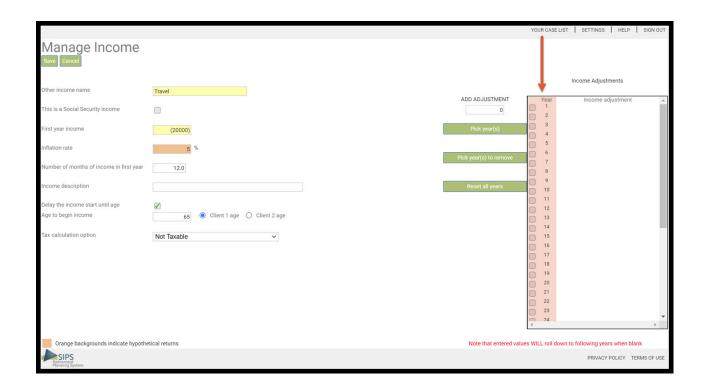
Step 12: Tax Calculation Option: In the text box, click on the down carrot arrow and select which tax option this income will be.



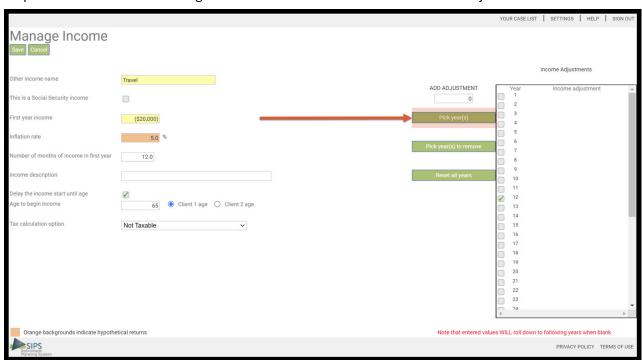
Step 13: Add Adjustment Text Box: To stop the distribution type in the numeric number 0 into the text box.



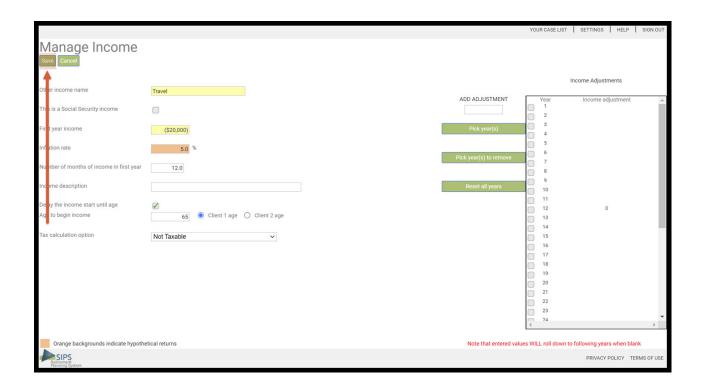
Step 14: Year: Click on the text box of which year the yearly distribution needs to stop by.



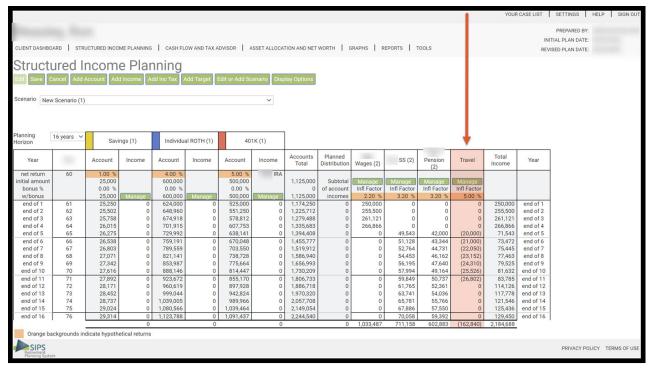
Step 15: Pick Years: Click on the green Pick Years Button underneath the Add Adjustment text box.



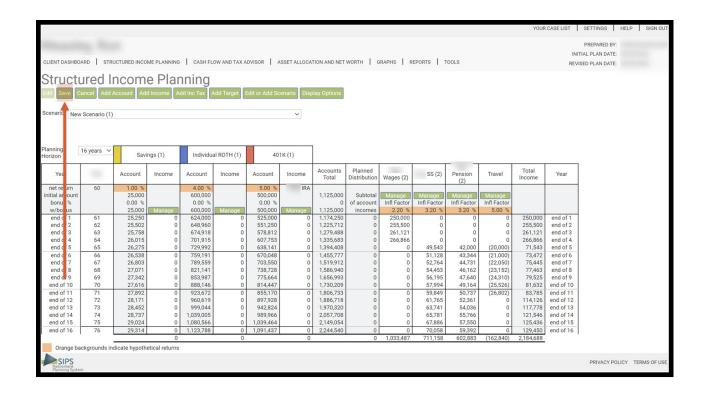
Step 16: Save: Click the green save button underneath the add income subheading.



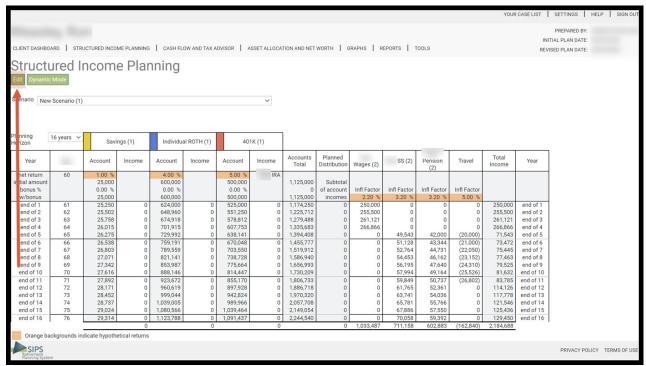
Step 17: Structured Income Planning Page: The new withdraw should have a separate column in the structured income plan.



Step 18: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



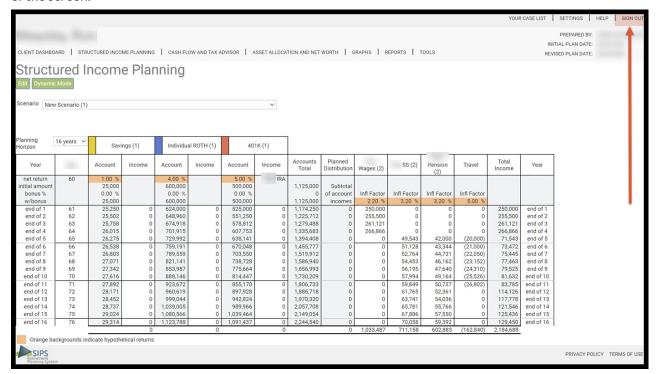
Step 19: Edit:If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning heading.



Step 20: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 21: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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.