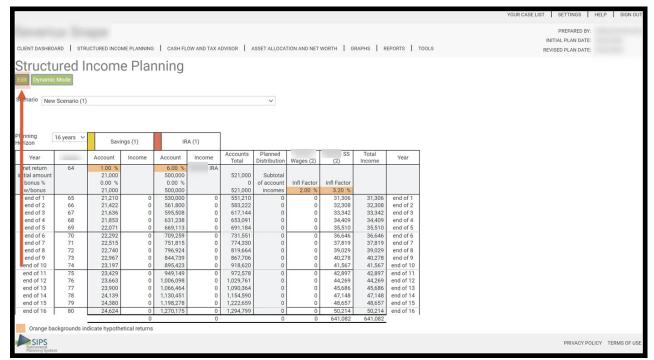
Entering a Life Insurance Policy and an Annual Premium

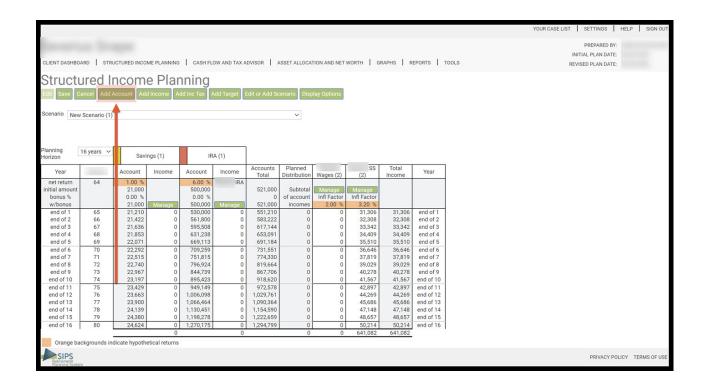
11/08/2024 1:28 pm EST

One of the unique and powerful tools of using SIPS is that you can enter in insurance policies into the structured income plan. Below is a step-by-step guideline to enter in an insurance policy.

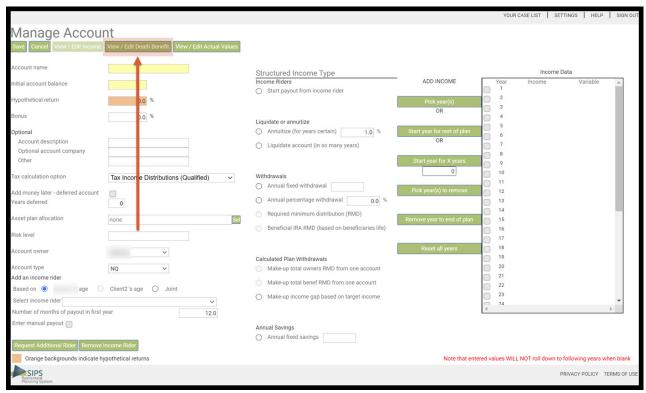
Step 1: Edit: Click on the green edit button underneath the structured income planning subheading title.



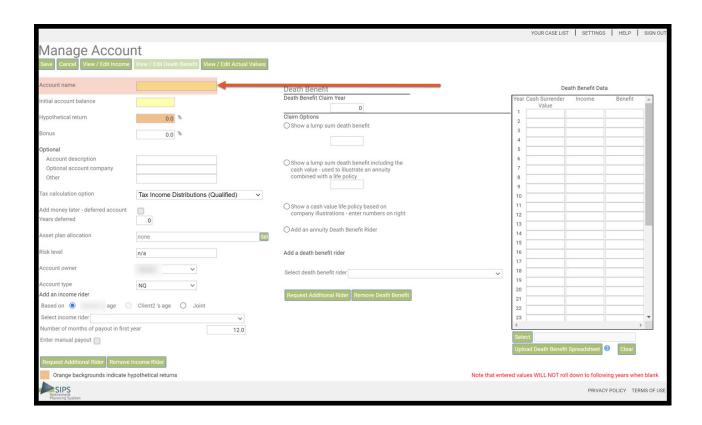
Step 2: Add Account: Click on the green add account button underneath the structured income planning subheading.



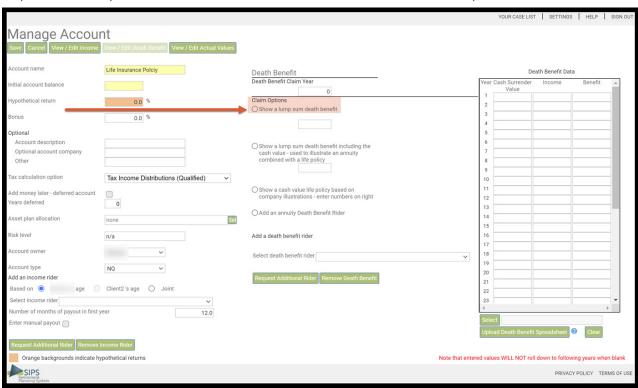
Step 3: View/Edit Death Benefit: Click on the green View/Edit Death Benefit button underneath the Manage Account subheading.



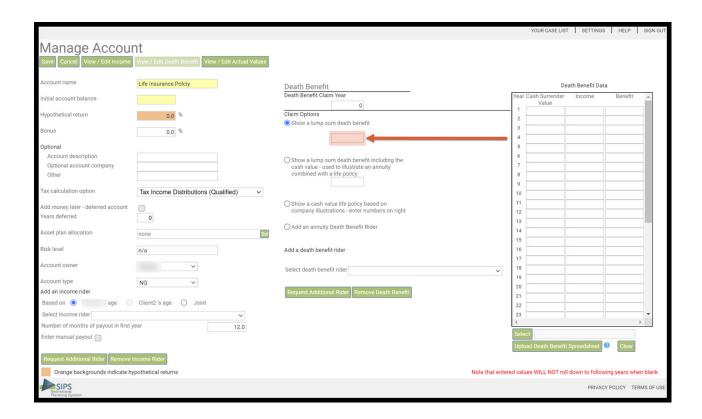
Step 4: Account Name: Type in the account name.



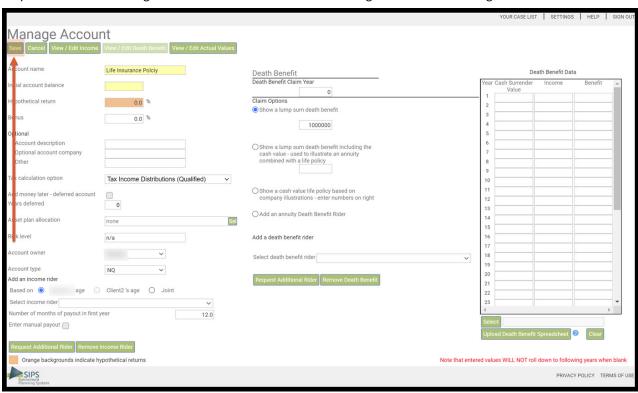
Step 5: Show a Lump Sum Death Benefit: Click on the radio button for the show a lump sum death benefit.



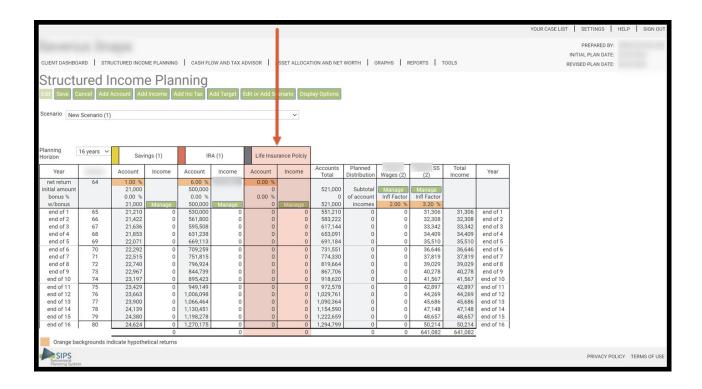
Step 6: Text Box: Type in the monetary amount.



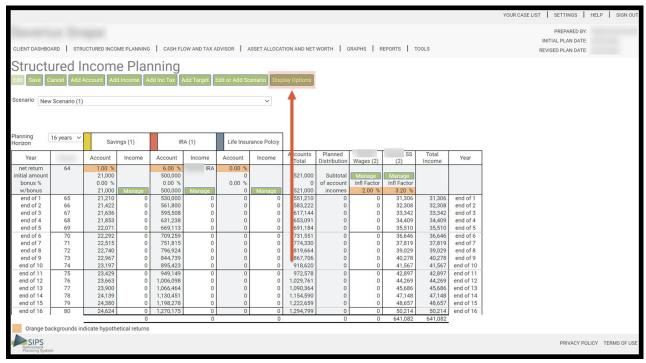
Step 7: Save: Click on the green save button underneath the manage account subheading.



Step 8: Structured Income Plan: A new column should appear in the structured income plan.



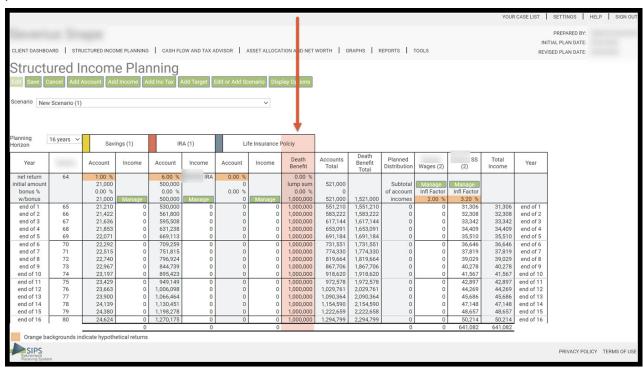
Step 9: Display Options: Click on the green display options subheading underneath the Structured Income Planning heading.



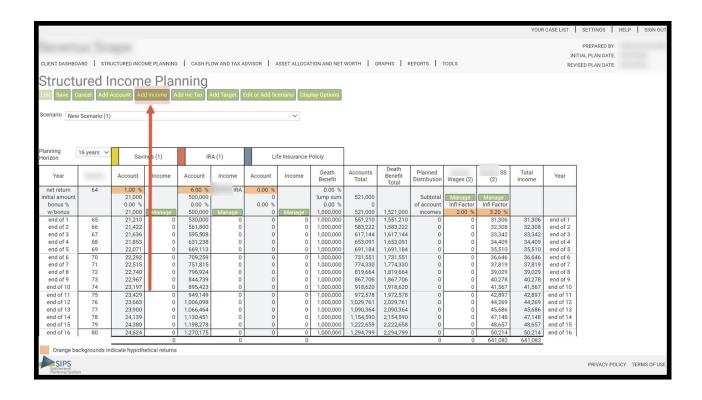
Step 10: Column Display Options: Click on the green View Death Benefit Button in the Column Display Options table.



Step 11: Structured Income Plan: A new column should appear under the Life Insurance column displaying the premium.



Step 12: Add Income: Click on the green Add Income button underneath the Structured Income Planning Title.



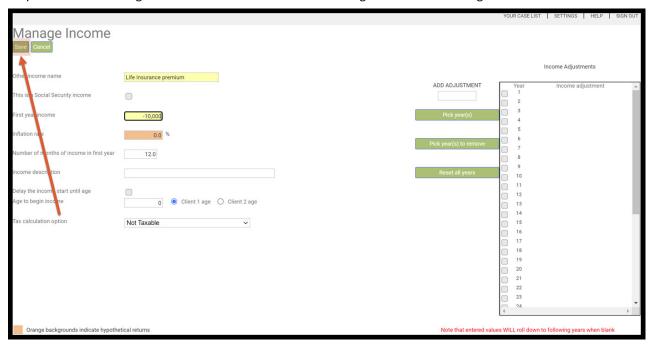
Step 13: Other Income Name: Type in a name.



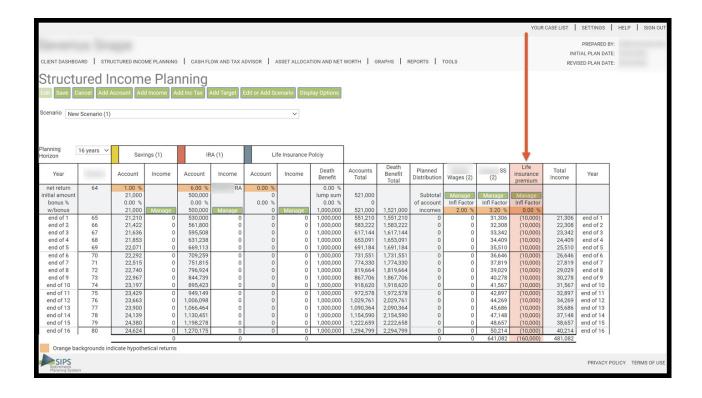
Step 14: First Year Income: Type in the monetary amount, for a withdrawal the numeric number starts with a minus sign.



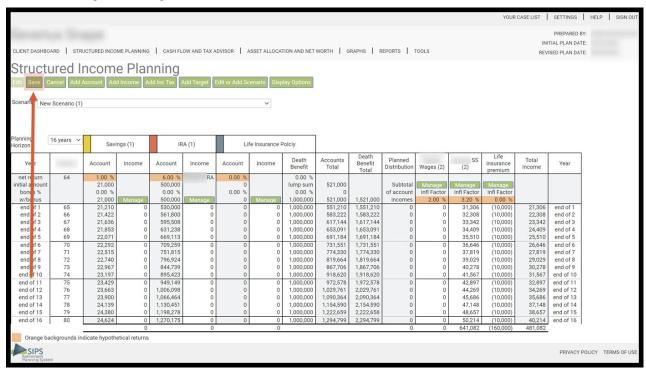
Step 15: Save: Click on green save button underneath the Manage Income subheading.



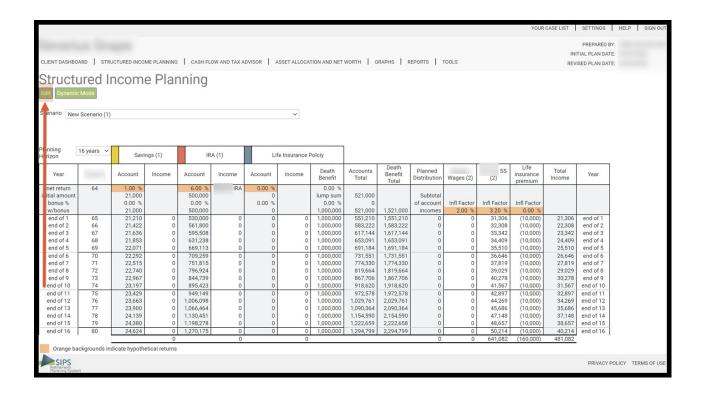
Step 16: Structured Income Plan: A new column of income should appear in the structured income plan.



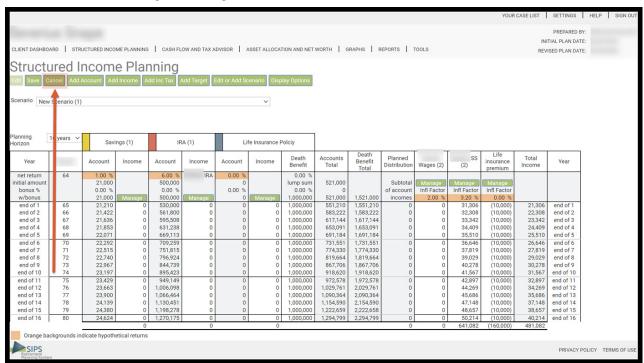
Step 17: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



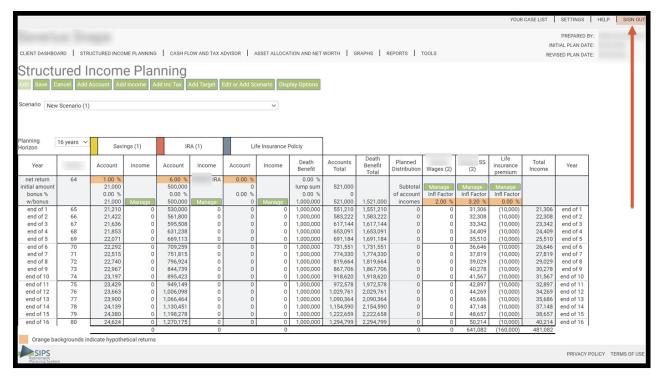
Step 18: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 18: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 19: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen. (wrong image, need the one where the green buttons are only 2)



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.