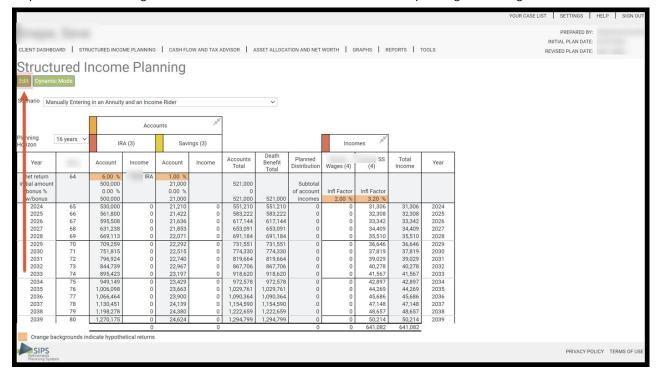
## Manually Entering in an Annuity and an Income Rider

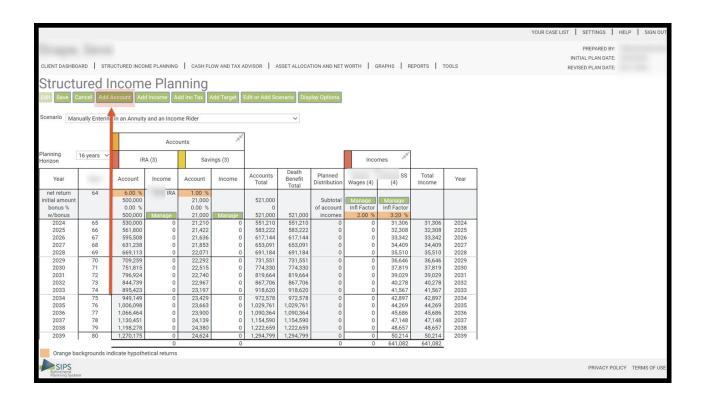
09/20/2024 8:57 am EDT

Within the Structured Income Planning page there is a capability for manually entering in an annuity plan. Below are the step by step guidelines for manually entering in an annuity plan.

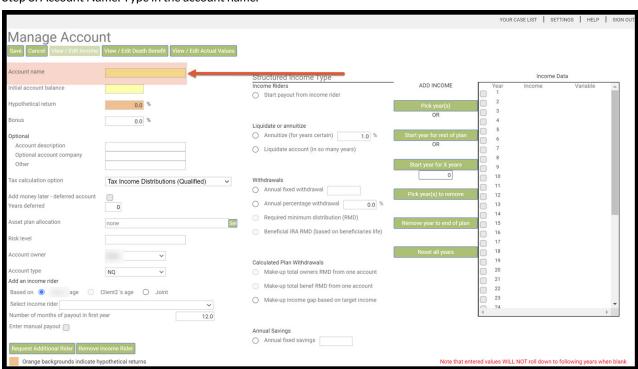
Step 1: Edit: Click on the green edit button underneath the structured income planning subheading title.



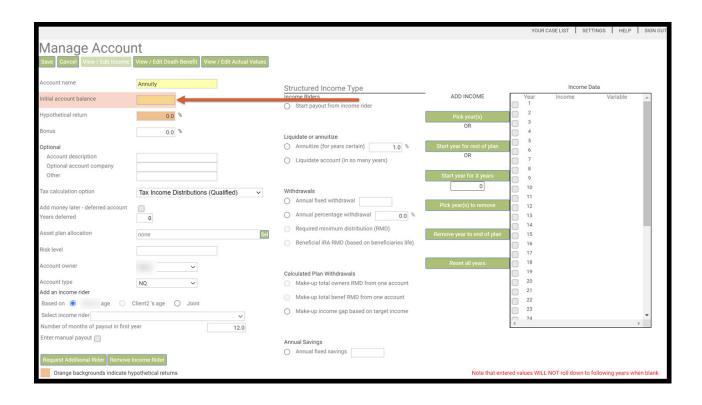
Step 2: Add Account: Click on the green add account button underneath the structured income planning subheading.



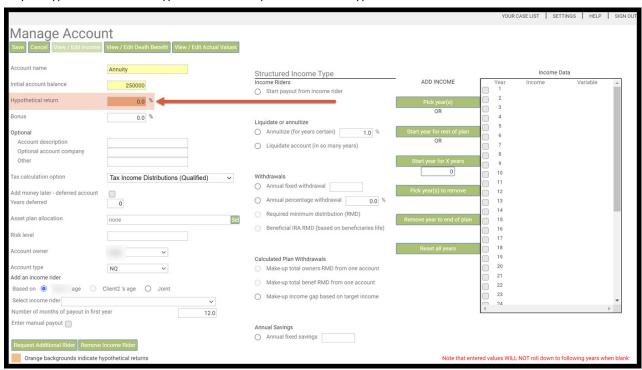
Step 3: Account Name: Type in the account name.



Step 4: Initial Account Balance: Type in the monetary amount for the annuity.



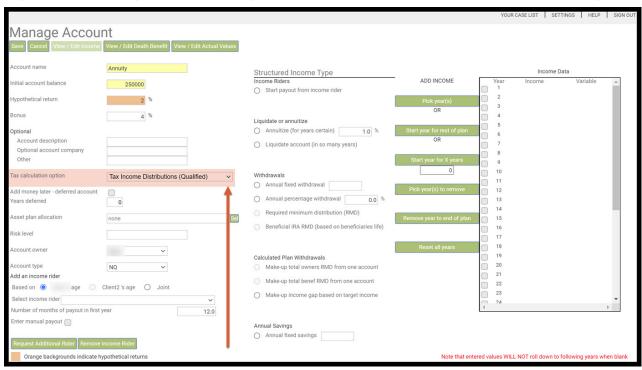
Step 5: Hypothetical Return: Type in the monetary number for the hypothetical return.



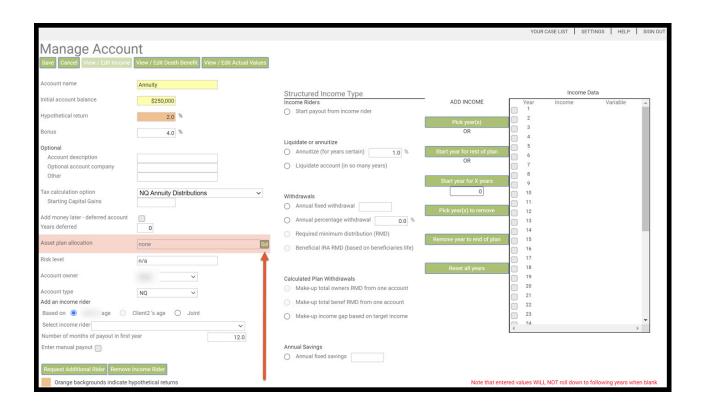
Step 6: Bonus: Type in the monetary number for the bonus that aligns with the annuity and income rider.

					YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Manage Accour	n†							
	View / Edit Death Benefit View / Edit Actual Values							
Account name	Annuity	Structured Income Type			Inc	ome Data		
Initial account balance	250000	Income Riders	ADD INCOME	Ye 1		Va	riable	^
Hypothetical return	2 %	Start payout from income rider	Pick year(s)	2				
Bonus			OR OR	3	3			
Bonus	0.0 %	Liquidate or annuitize		9 5	5			
Optional Account description		Annuitize (for years certain) 1.0 %	Start year for rest of plan OR	0 6	5			
Optional account company		Liquidate account (in so many years)	OK .	7	7			
Other			Start year for X years					
Tax calculation option	Tax Income Distributions (Qualified)	Withdrawals	0	1	0			
1.00 min 1.0		Annual fixed withdrawal	Pick year(s) to remove	0 1				
Add money later - deferred account Years deferred	0	O Annual percentage withdrawal 0.0 %	Fick year(s) to remove	11				
		Required minimum distribution (RMD)		1-	4			
Asset plan allocation	none Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	1				
Risk level		beneficial IRA RMD (based on beneficialles life)		1				
Account owner	~		Reset all years	1				
75 755		Calculated Plan Withdrawals		1				
Account type	NQ ~	Make-up total owners RMD from one account		2 2				
Add an income rider		<ul> <li>Make-up total benef RMD from one account</li> </ul>		2				
Based on  age Client2 's age Joint		Make-up income gap based on target income		2	3			
Select income rider  Number of months of payout in first ye	~			7.	4		<b>)</b>	*
	12.0							-
Enter manual payout		Annual Savings						
Request Additional Rider Remove In	ncome Rider	Annual fixed savings						
Orange backgrounds indicate hyp	pothetical returns		Note that entere	ed value	s WILL NOT roll do	wn to following	years when	blank

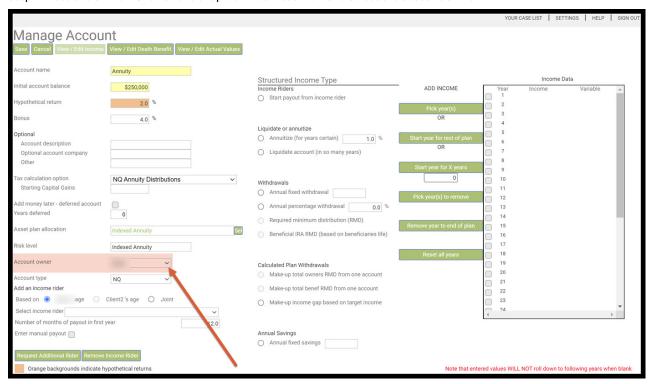
Step 7: Tax Calculation Option: Click on the drop-down carrot arrow in the text box and select the tax calculation option.



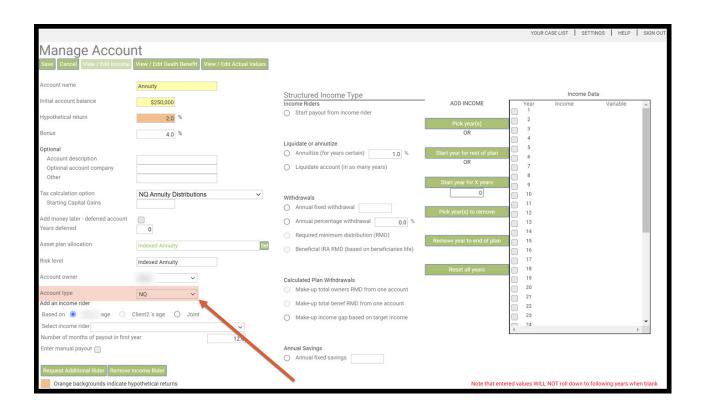
Step 8: Sel: Click on the green Sel button next to the text box for the asset plan allocation and select the asset plan allocation.



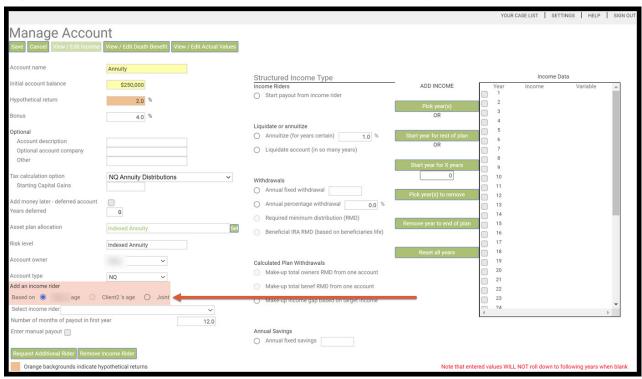
Step 9: Account Owner: Click on the drop-down carrot arrow and select the account owner.



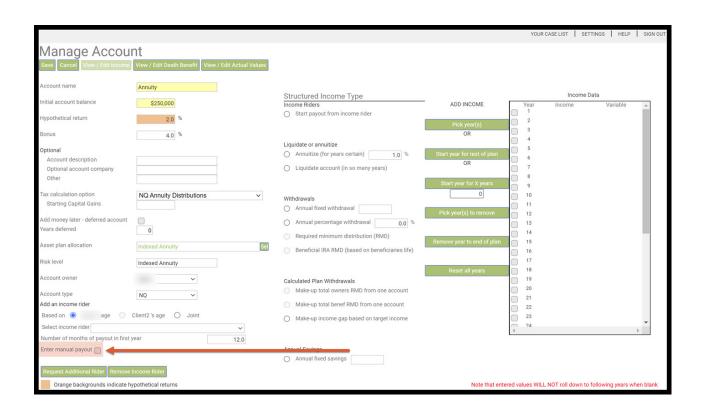
Step 10: Account Type: Click on the drop-down carrot arrow and select account type.



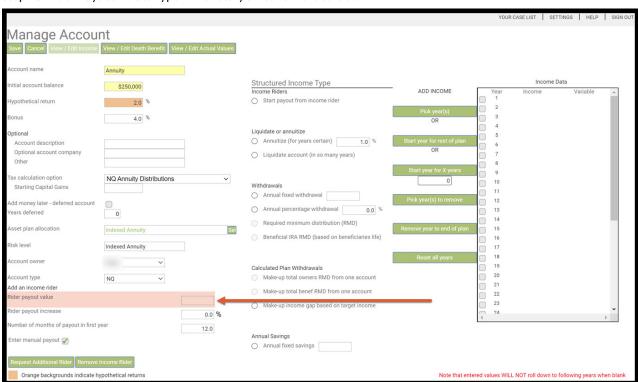
Step 11: Add an Income Rider: Click on which radio button the client has an annuity for.



Step 12: Enter Manual Payout: Click on text box.



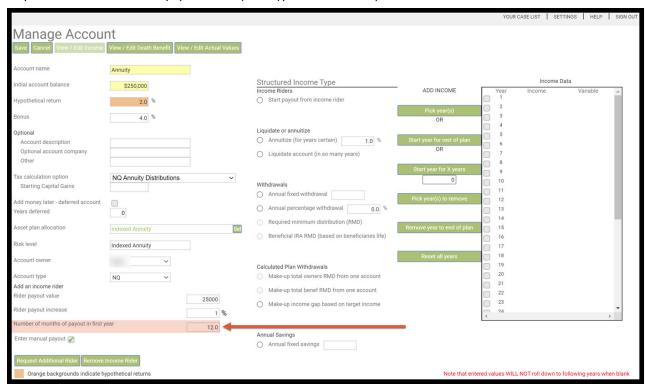
Step 13: Rider Payout Value: Type in monetary amount in the text box.



Step 14: Rider Payout Increase: Type in monetary percentage into the text box.

					Υ	OUR CASE LIST	SETTINGS   HELP	SIGN OUT
Manage Accour	nt							
		/ Edit Actual Values						
Account name	Annuity							
Initial account balance	\$250,000		Structured Income Type				me Data	
Hypothetical return	2.0 %		Income Riders  Start payout from income rider	ADD INCOME	Year 1	Income	Variable	^
Bonus	4.0 %			Pick year(s) OR	2 3			
Optional Account description Optional account company Other			Liquidate or annuitize  Annuitize (for years certain) 1,0 %  Liquidate account (in so many years)	Start year for rest of plan OR	4 5 6 7			ı
Tax calculation option Starting Capital Gains	NQ Annuity Distributions	~	Withdrawals  Annual fixed withdrawal	Start year for X years  0  Pick year(s) to remove	9 10 11 11 12			
Add money later - deferred account Years deferred	0		O Annual percentage withdrawal 0.0 %	r ion year(o) to remote	13			
Asset plan allocation	Indexed Annuity	Sel	Required minimum distribution (RMD)  Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	14 15 16			
Risk level	Indexed Annuity				17			
Account owner	~		Calculated Plan Withdrawals	Reset all years	18 19			
Account type	NQ ~		Make-up total owners RMD from one account		20			
Add an income rider Rider payout value		25000	Make-up total benef RMD from one account		22			
Rider payout increase		0.0 %	Make-up income gap based on target income		23			*
Number of months of payout in first year.  Enter manual payout	ear	12.0	Annual Savings  Annual fixed savings					
Request Additional Rider Remove In				No. above		NULL NOT II down		h blb
Orange backgrounds indicate hypothetical returns  Note that entered values WILL NOT roll down to following years when blank								

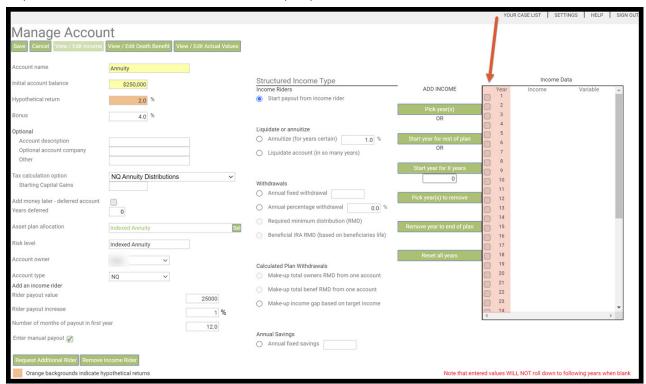
Step 15: Number of months of payout in first year: Type in the monetary number for the months. The default is set to 12.



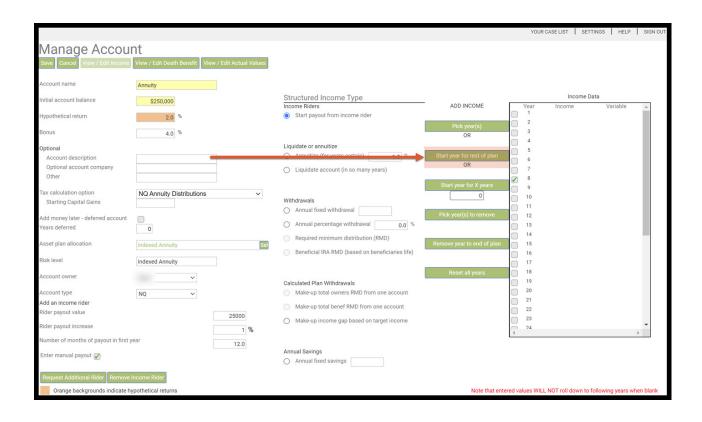
Step 16: Structured Income Type: Select the radio button for Income Riders: Start payout from income rider.

				YO	UR CASE LIST S	ETTINGS   HELP	SIGN OUT
Manage Accour	nt						
Save Cancel View / Edit Income	View / Edit Death Benefit View / Edit Actual Values						
Account name	Annuity						
Initial account balance	\$250,000	Structured Income Type			Income		
500 5000 40 18 00 50		Income Riders	ADD INCOME	Year 1	Income	Variable	^
Hypothetical return	2.0	Start payout from income rider	100000000000000000000000000000000000000	2			
Bonus	4.0 %		Pick year(s) OR	3			
PAGE 2007 CO. No.		Unidas a sanitina	OK	0 4			
Optional		Liquidate or annuitize  Annuitize (for years certain) 1.0 %	Start year for rest of plan	5			
Account description Optional account company			OR OR	6			
Other		Liquidate account (in so many years)		7			
Other			Start year for X years				
Tax calculation option	NQ Annuity Distributions	Larry 19	0	0 10			
Starting Capital Gains		Withdrawals  Annual fixed withdrawal		O 11			
Add money later - deferred account			Pick year(s) to remove	12			
Years deferred	0	On Annual percentage withdrawal 0.0 %		13			
2 2 2 W 12		Required minimum distribution (RMD)		14			
Asset plan allocation	Indexed Annuity Sel	Beneficial IRA RMD (based on beneficiaries life)	Remove year to end of plan	15			
Risk level	Indexed Annuity	beneficial the time (based on beneficialles life)		17			
20 - 2 - 12 - 12			Reset all years	18			
Account owner	~	Calculated Plan Withdrawals		19			
Account type	NQ ~	Make-up total owners RMD from one account		20			
Add an income rider		Make-up total benef RMD from one account		21			
Rider payout value	25000			22			
Rider payout increase	1 %	Make-up income gap based on target income		23			<b>*</b>
Number of months of payout in first year 12.0							
Enter manual payout 🗸	12.0	Annual Savings					
and Manda payout		Annual fixed savings					
	ncome Rider						
Orange backgrounds indicate hypothetical returns  Note that entered values WILL NOT roll down to following years when blank							

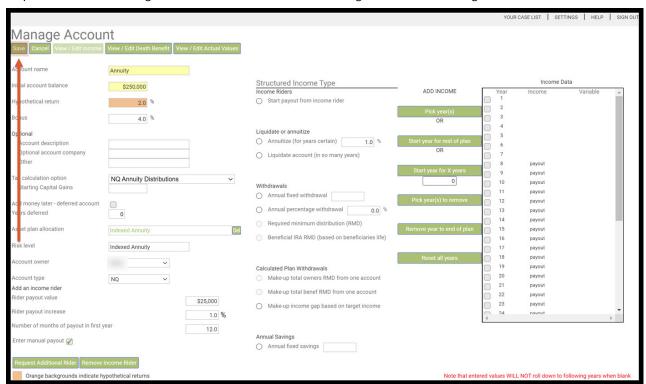
Step 17: Income Data: Click on the text box for which year you would like the Income data to start on.



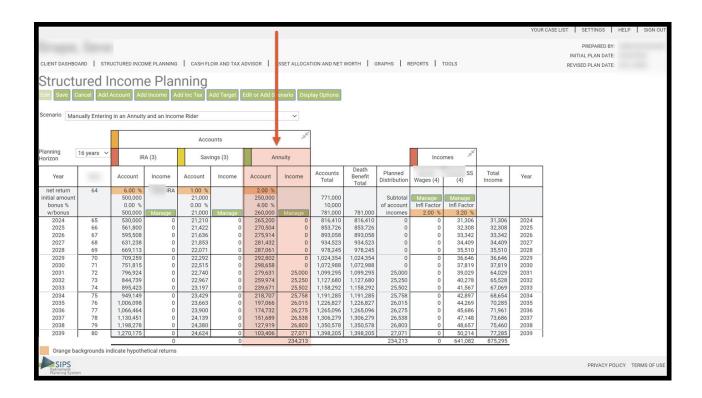
Step 18: Start Year for Rest of Plan: Click on the green Start year for rest of plan button next to the Income Data Table.



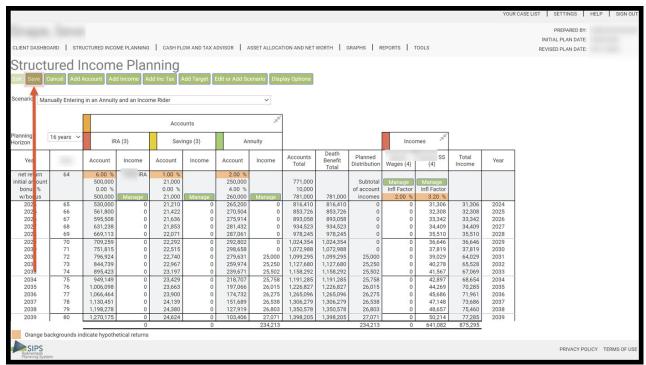
Step 19: Save: Click on the green Save button underneath the Manage Account Subheading.



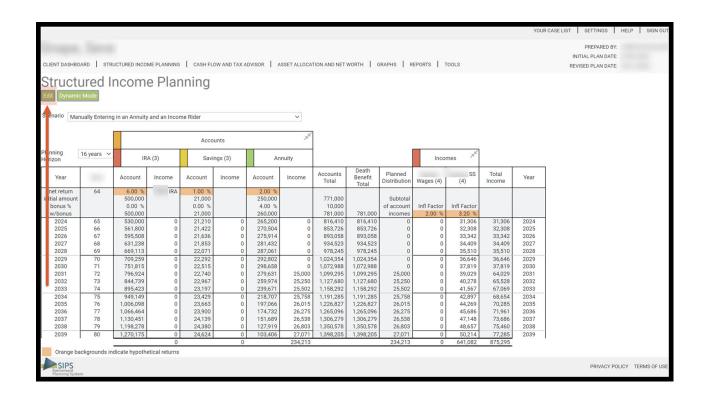
Step 20: Structured Income Plan: A new column of income should appear in the structured income plan.



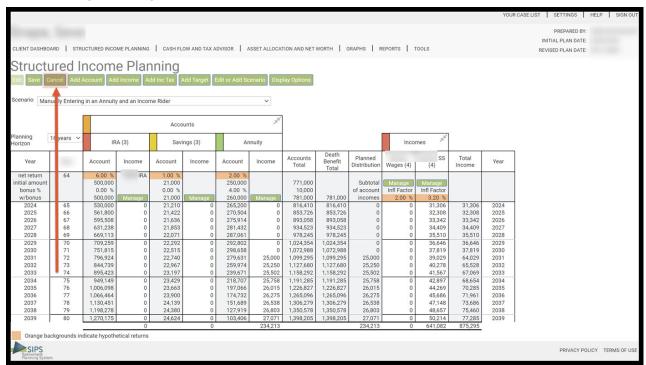
Step 21: Saving the Structured Income Planning Scenario: Click the green Save button underneath the Structured Income Planning subheading.



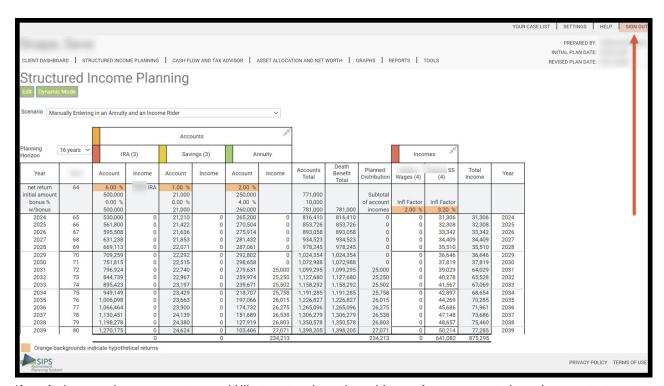
Step 22: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 23: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 24: 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.