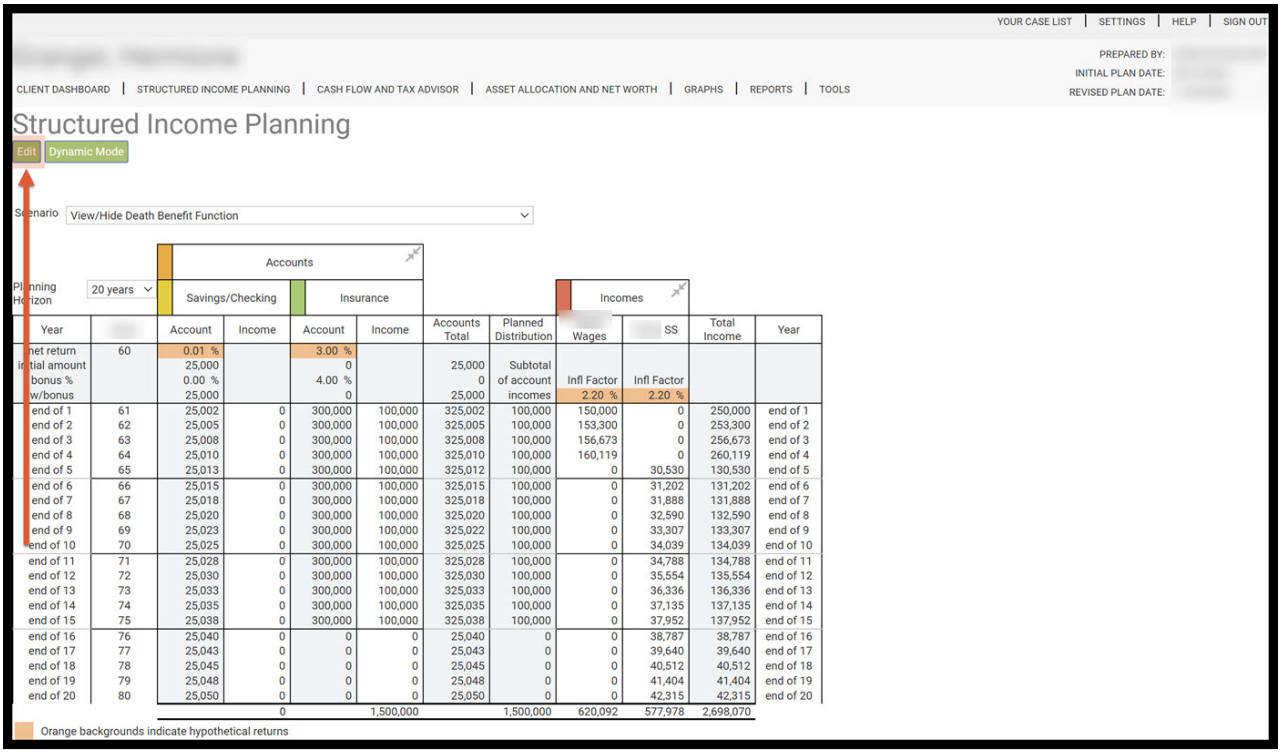
View Death Benefit Function

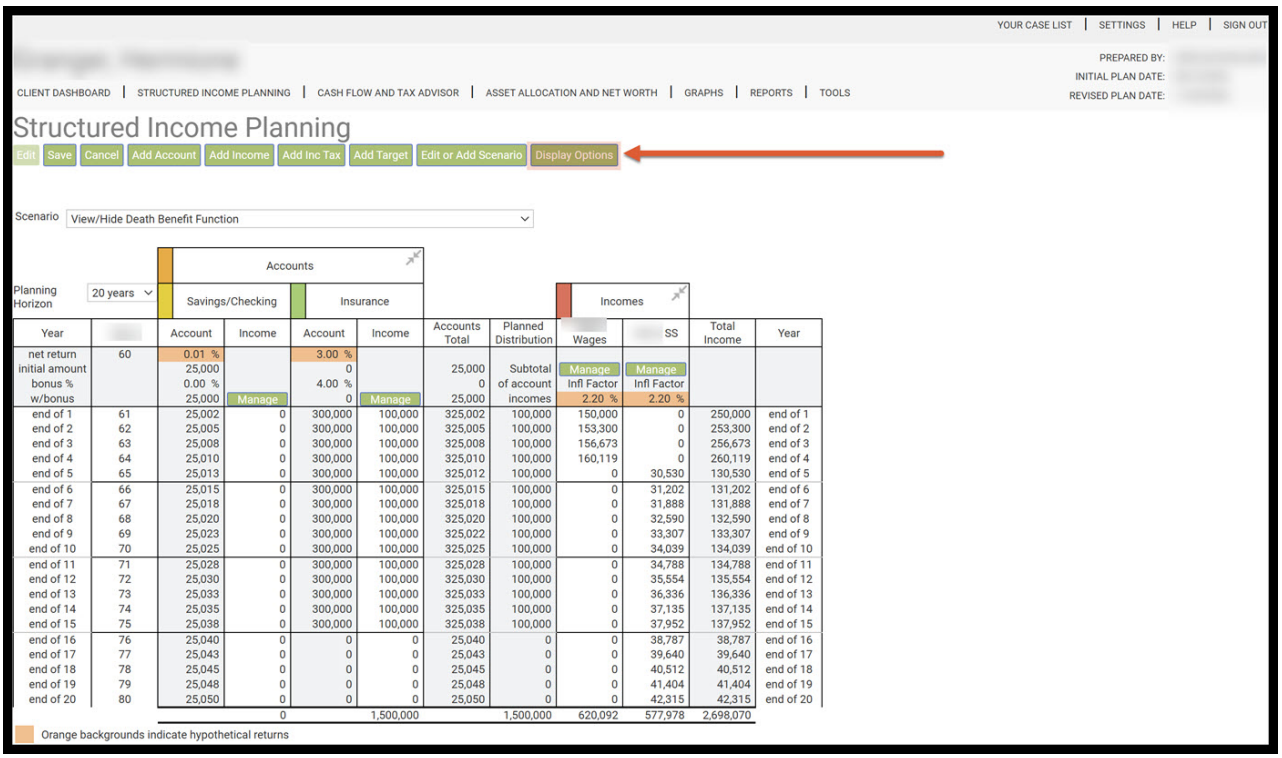
11/06/2024 10:26 am EST

On the structured Income planning page you can view death benefits for insurance policies. Below is a step-by-step guideline to view the death benefit for an insurance policy.

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

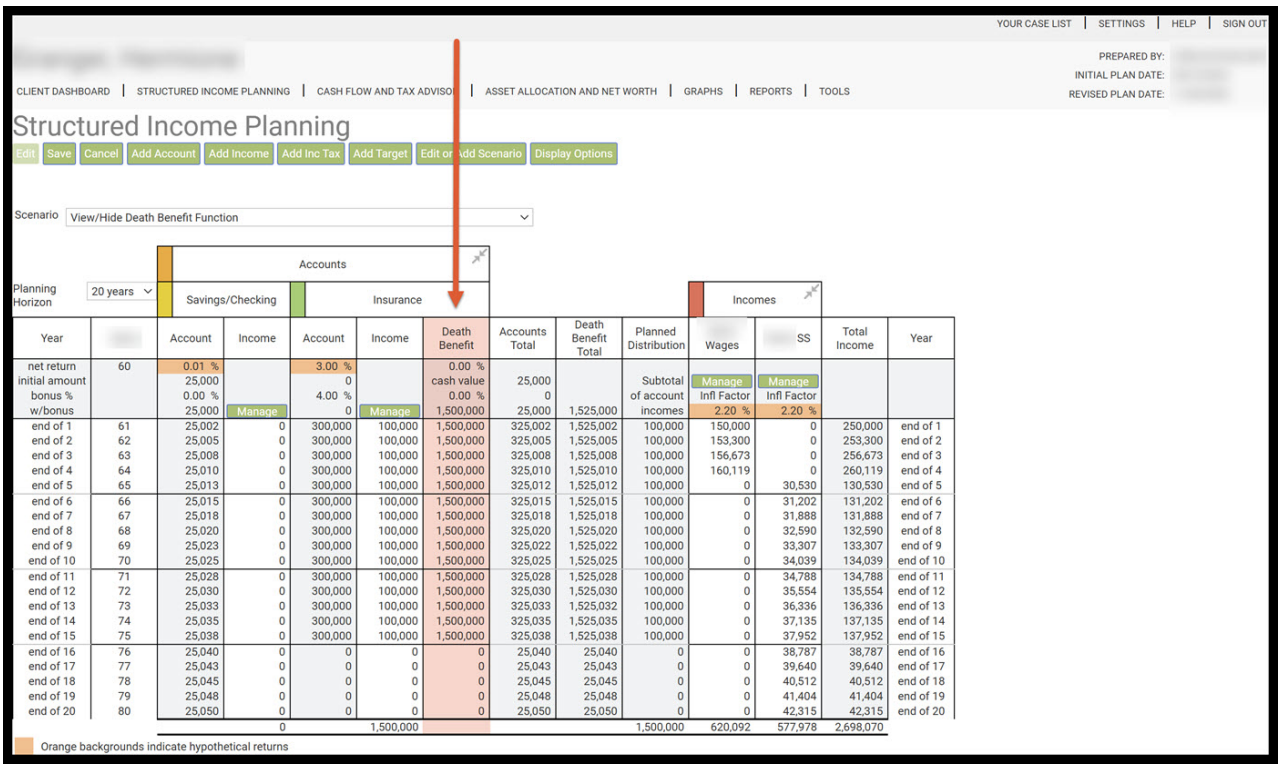


Step 2: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.

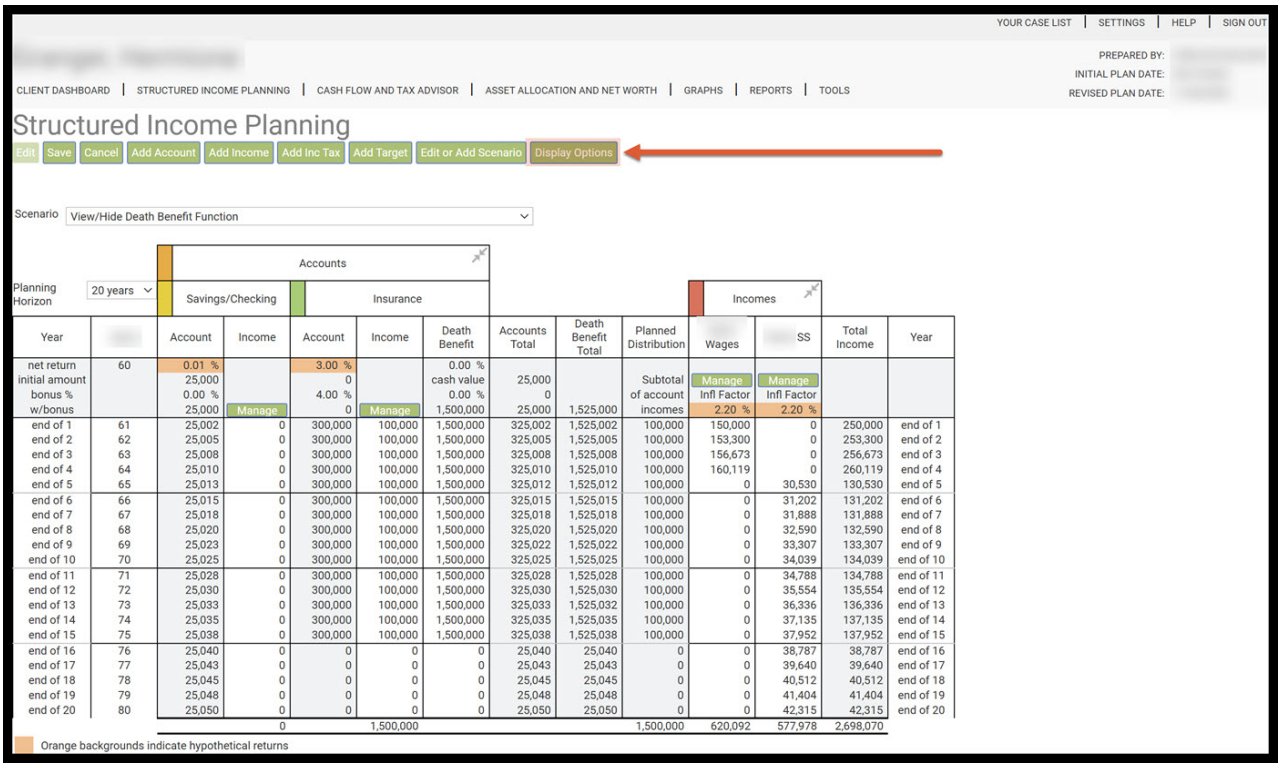


Step 3: View Death Benefit: Click on the green View Death Benefit button located in the Column Display Options Table.

Step 4: Structured Income Plan: A new column called Death Benefit will appear under the Insurance column.

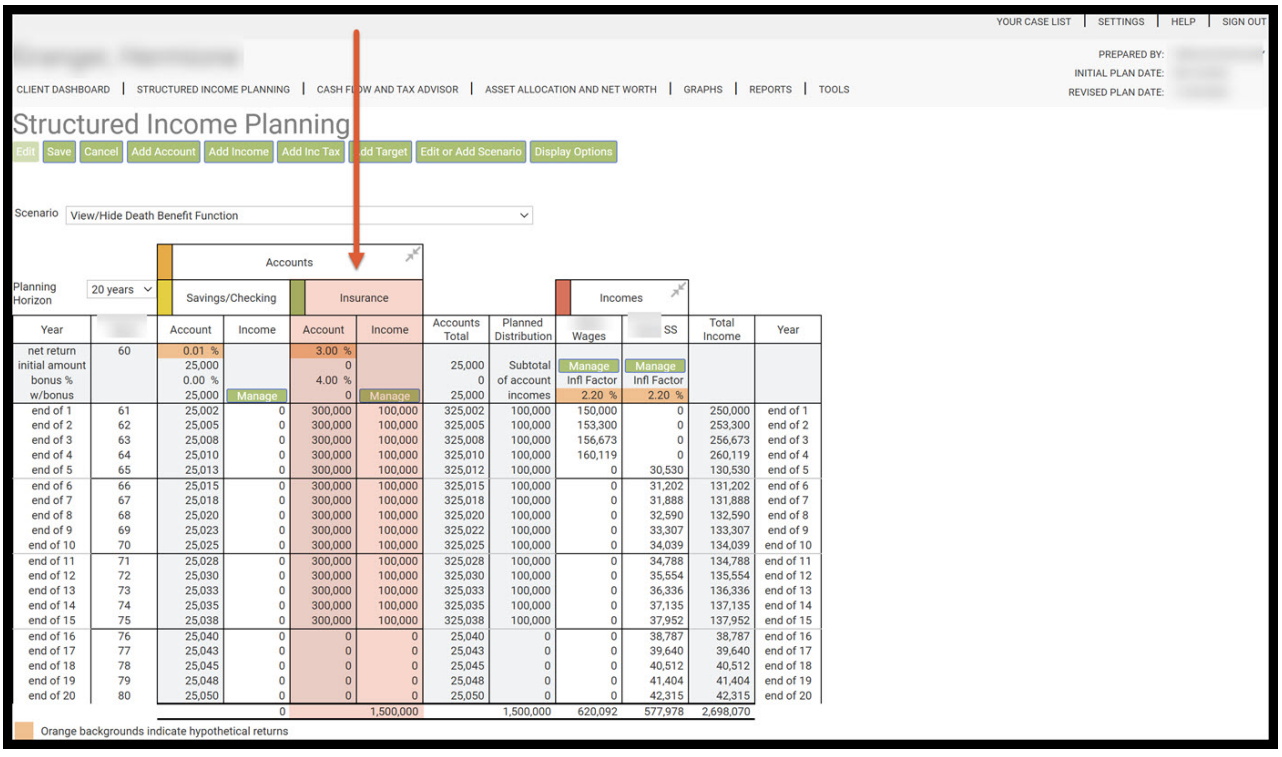


Step 5: Display Options: Click on the green Display Option button underneath the Structured Income Planning sub-heading.

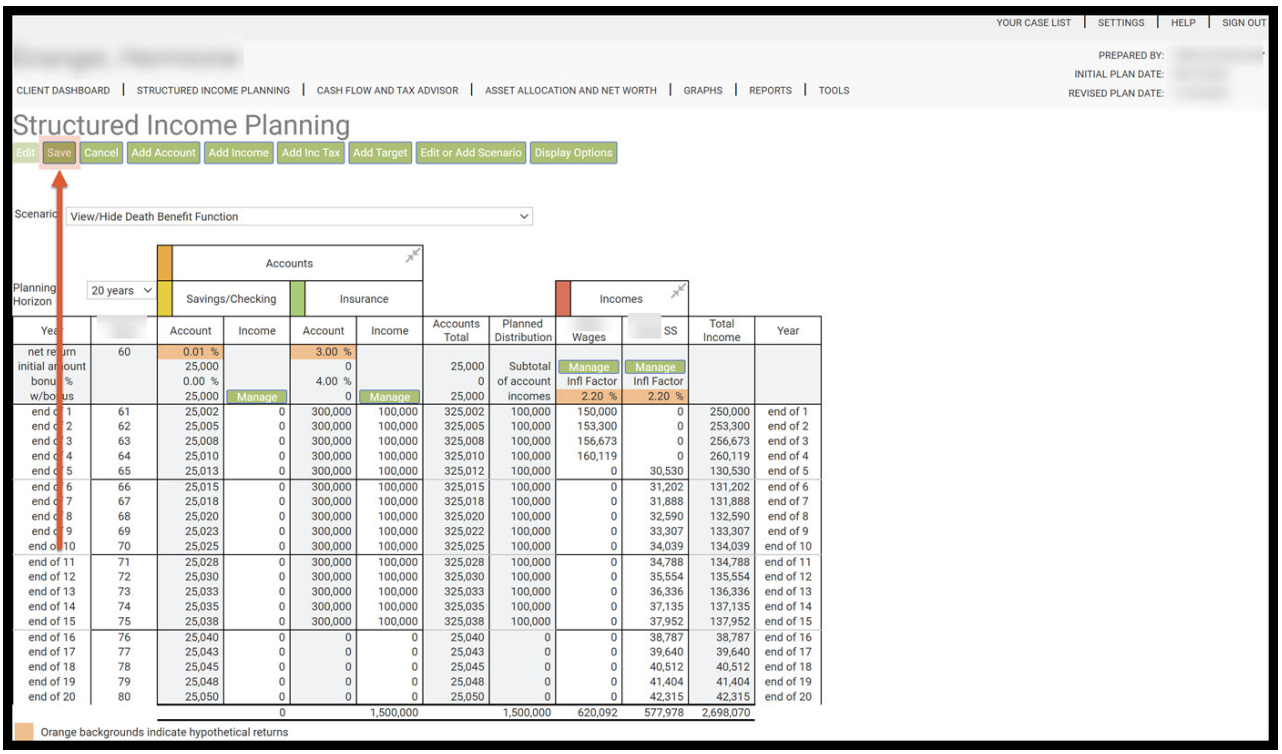


Step 6: Hide Death Benefit: Click on the green Hide Death Benefit button located in the Column Display Options Table.

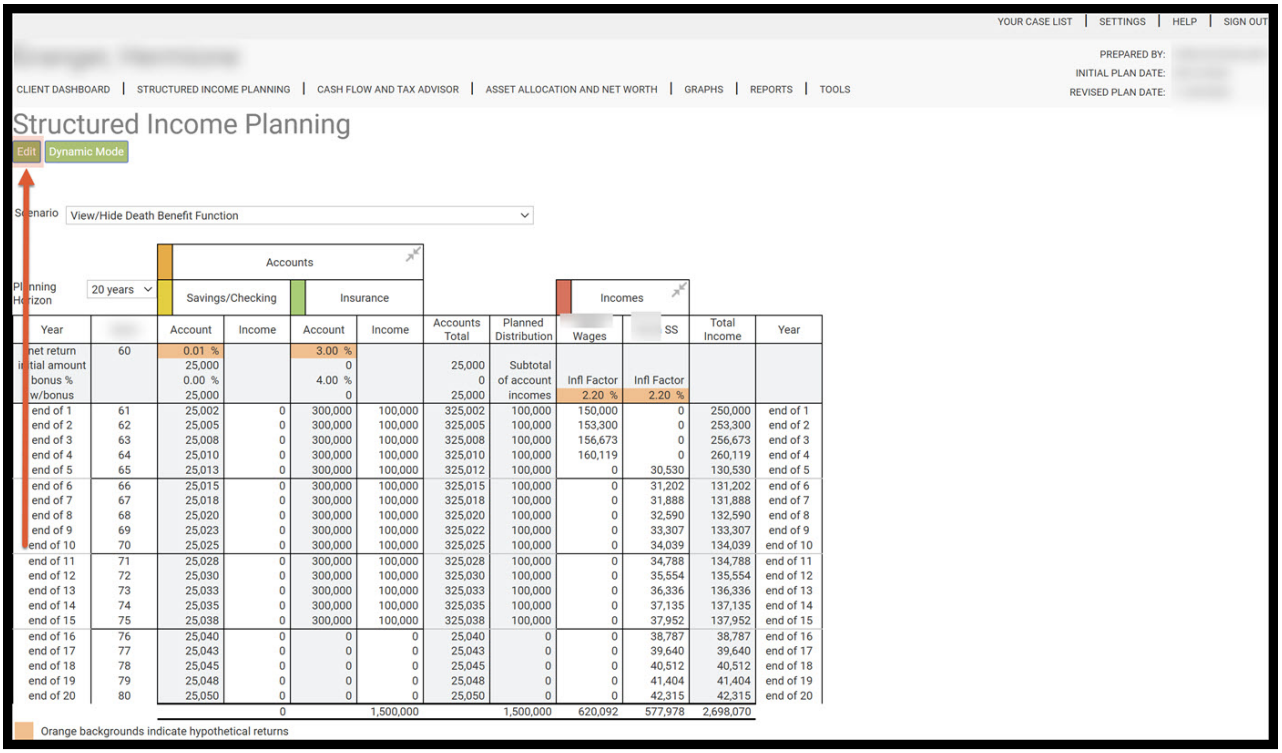
Step 7: Structured Income Plan: The Death Benefit will be removed from the Insurance Column.



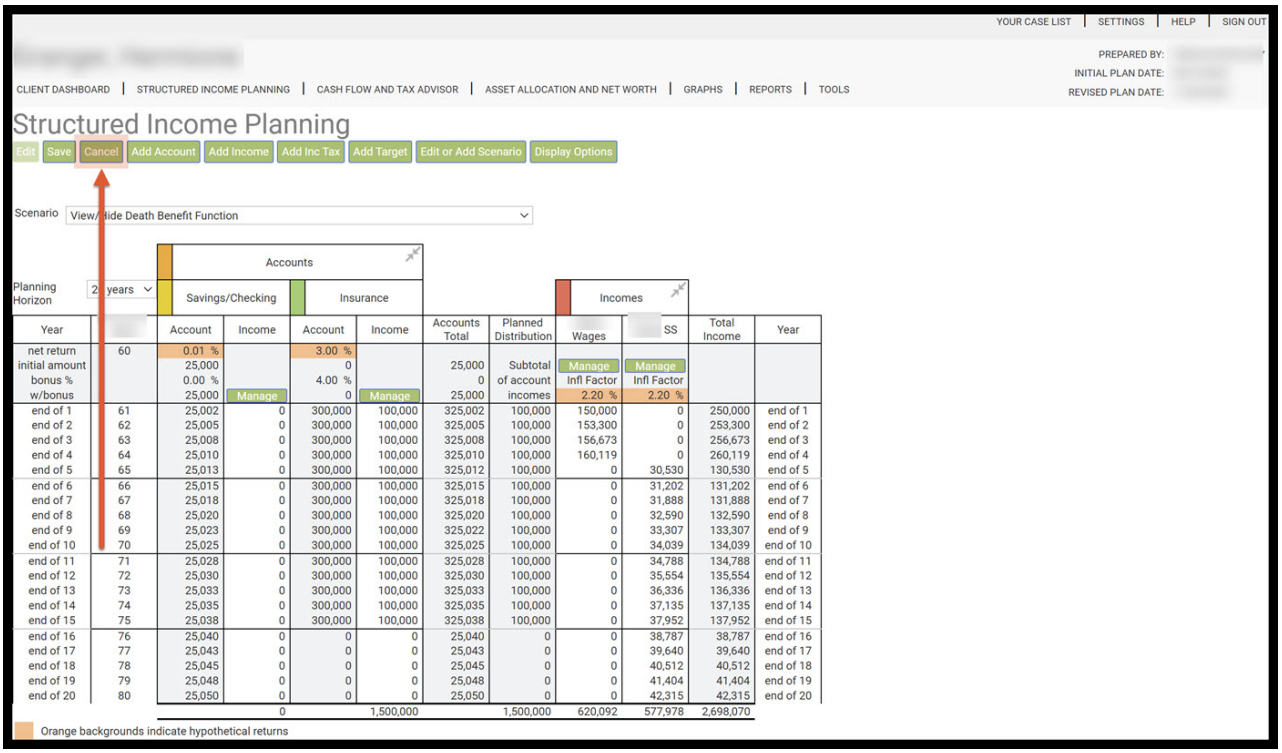
Step 8: Saving the Structured Income Planning Scenario: Click on the green Save button underneath the Structured Income Planning Subheading.



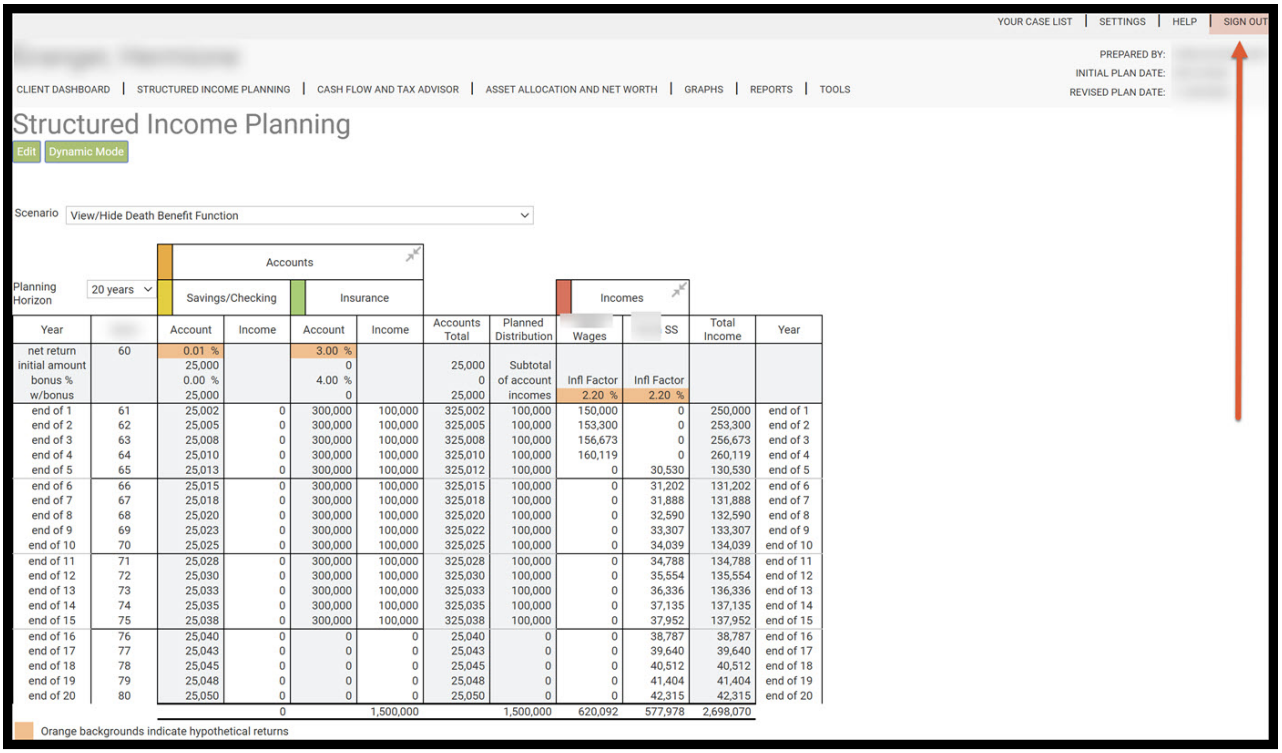
Step 9: Edit: If you need to make an edit to the structured income plan click on the green edit button underneath the Structured Income Planning subheading.



Step 10: Cancel: If you need to go back to the previous page, click on the green Cancel button underneath the Structured Income Planning subheading.



Step 11: Logout: To log 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.