Editing the Default Percentage Amounts on the Allocation Codes

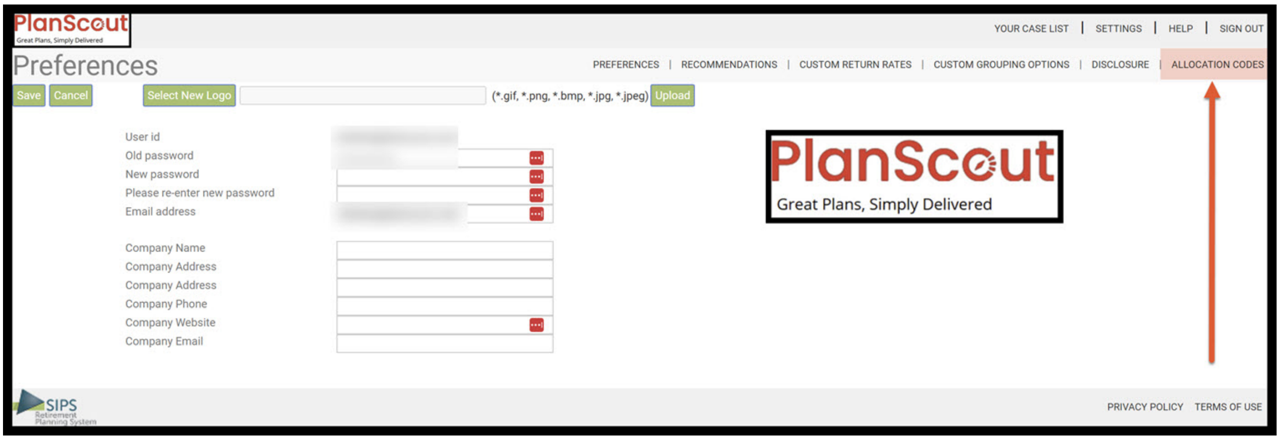
01/02/2026 9:14 am EST

Underneath the Settings subheading, you'll find the allocation codes. On the allocation codes list page, you can edit the default percentage amounts, which are set to zero by default. Once you update the default percentages, any allocation you select that has been edited will automatically adopt the new default percentage. Below are examples of updating the default percentages for the allocation codes.

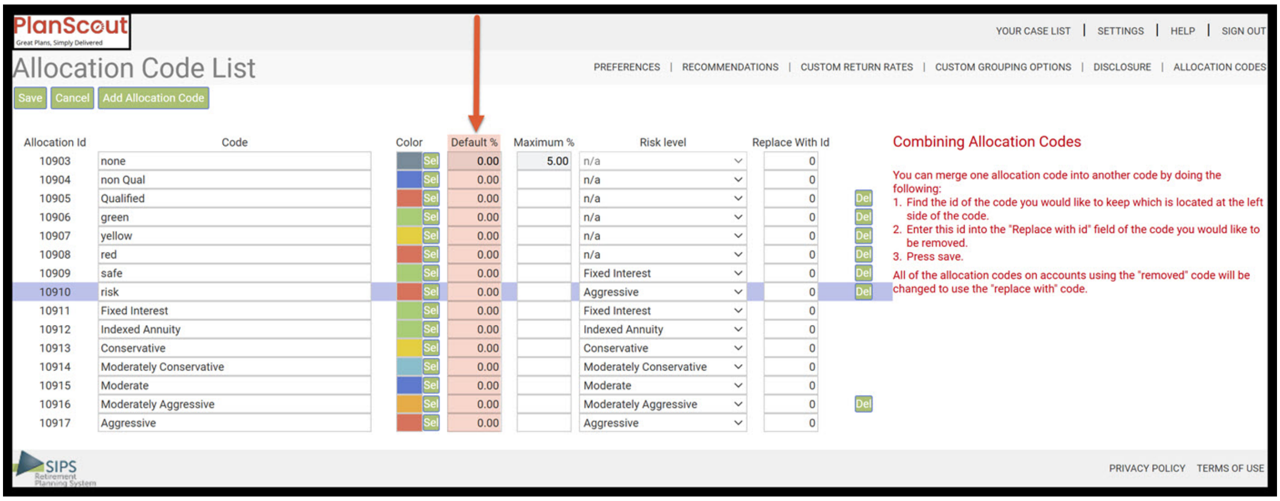
Step 1: Log In: Log in into SIPS.

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

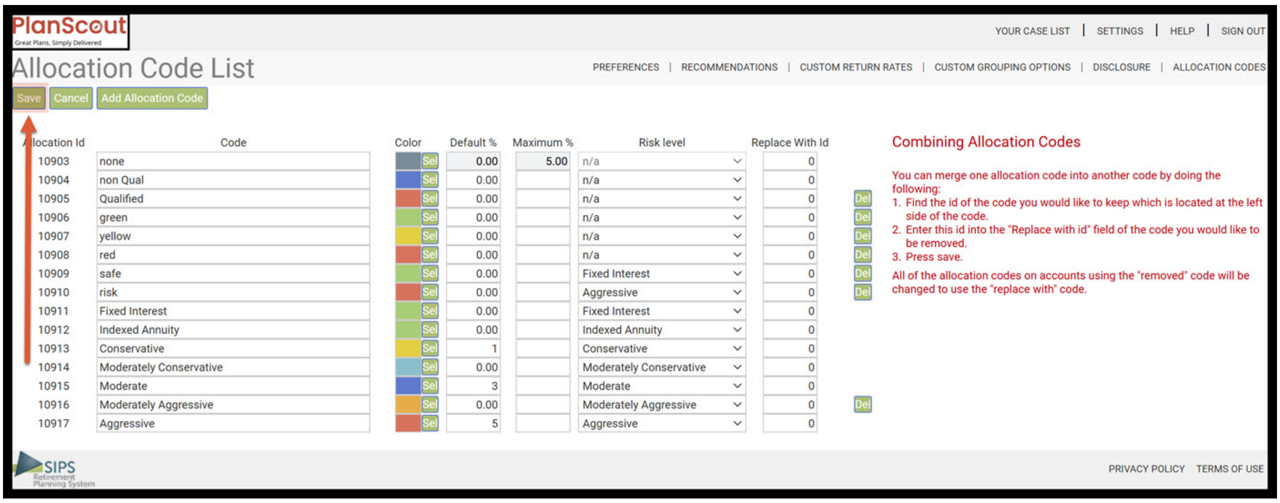
Step 3: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen.



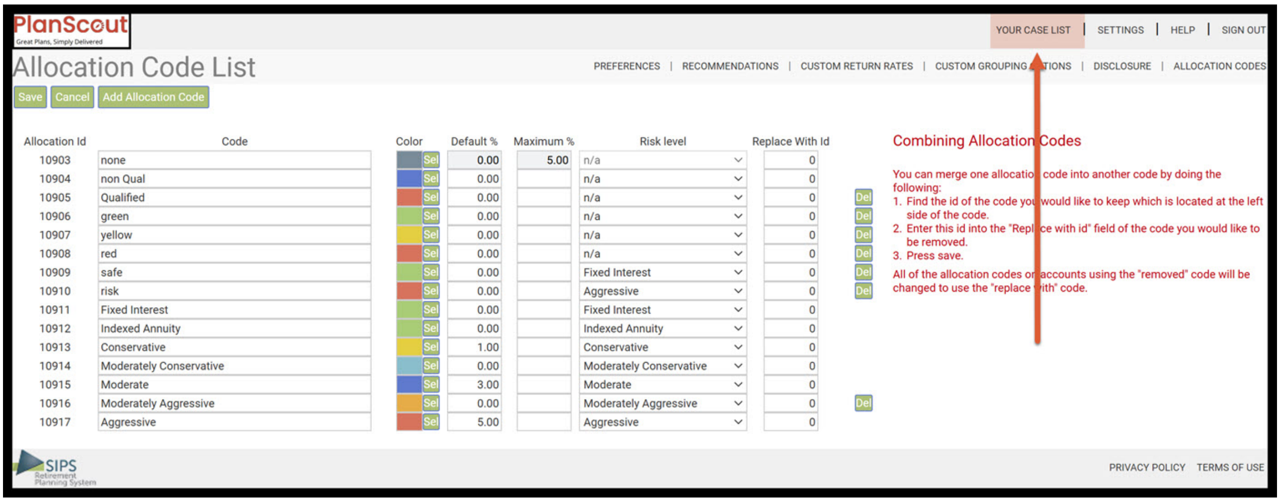
Step 4: Default %: Edit the default % amounts.



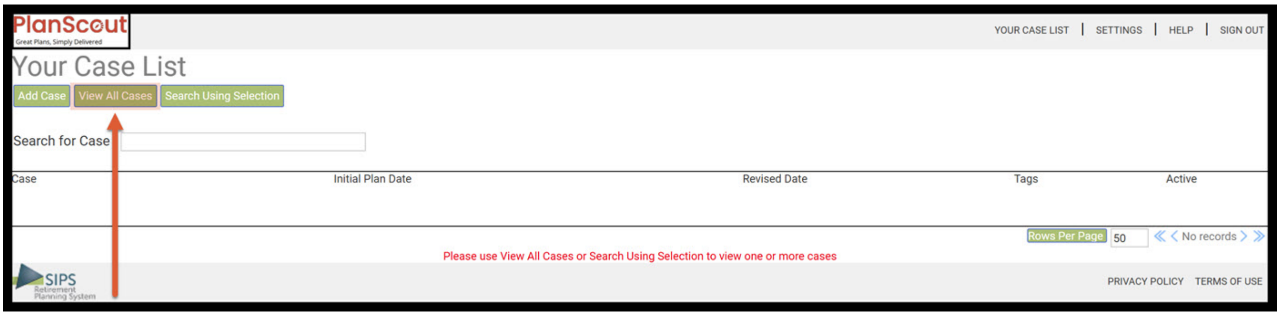
Step 5: Save: Click the green Save button underneath the Allocation Code List.



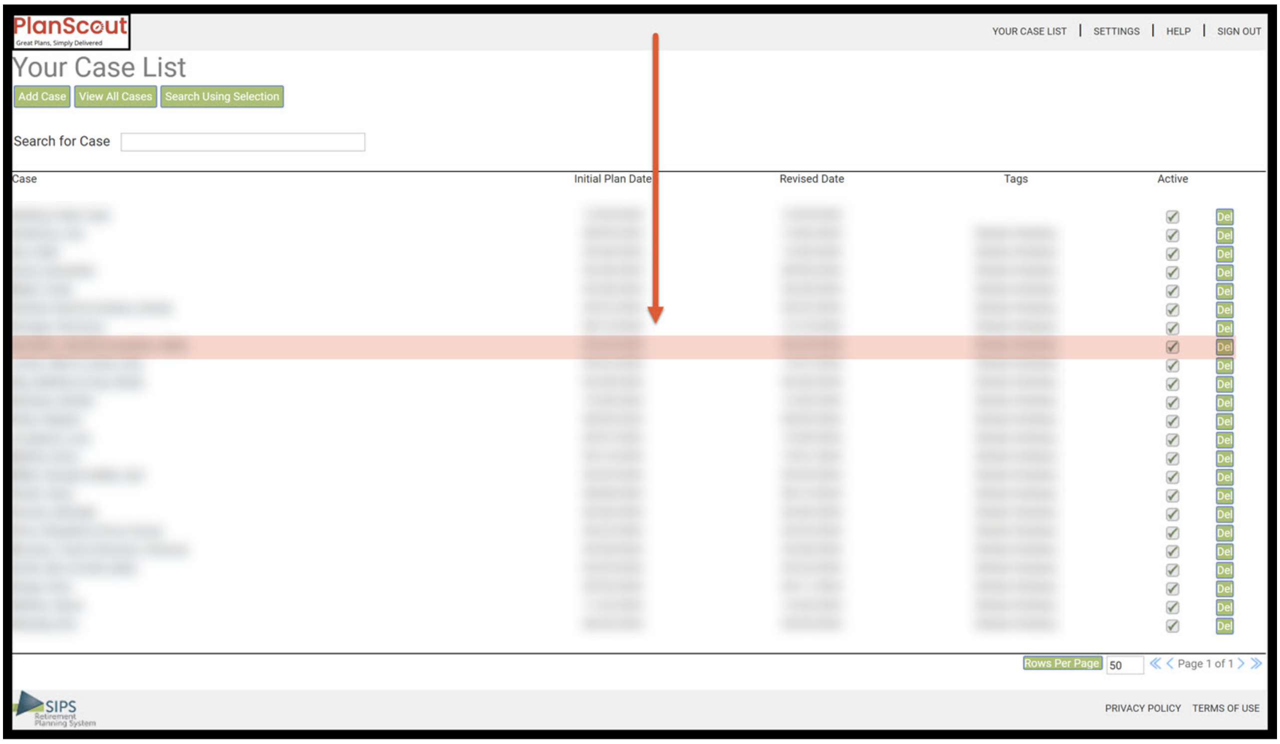
Step 6: Your Case List: Click on the Your Case List button located on the left-hand side of the screen.



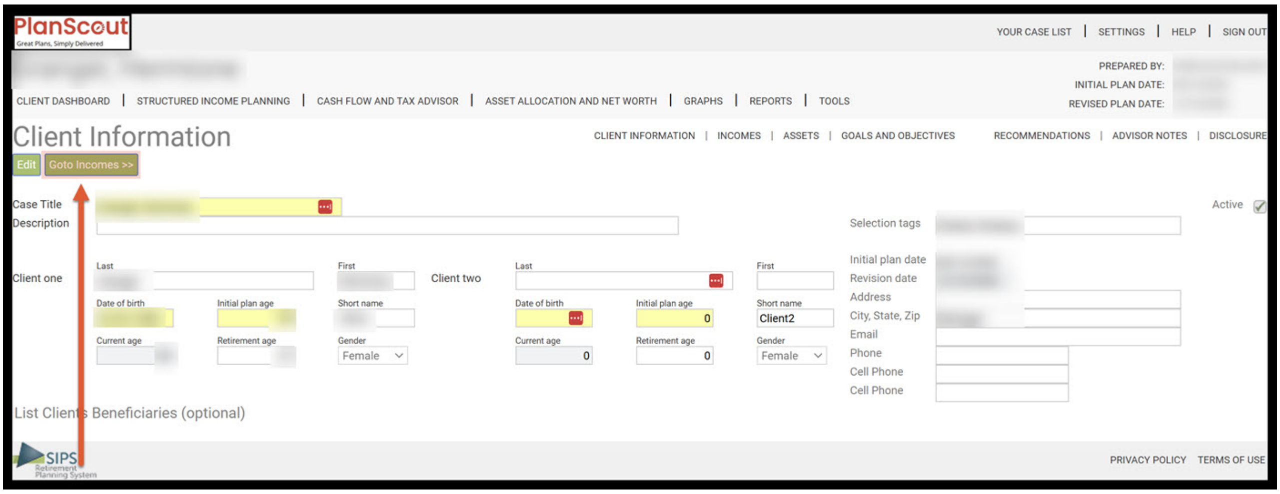
Step 7: View All Cases: Click on the green View All Cases button underneath Your Case List heading.



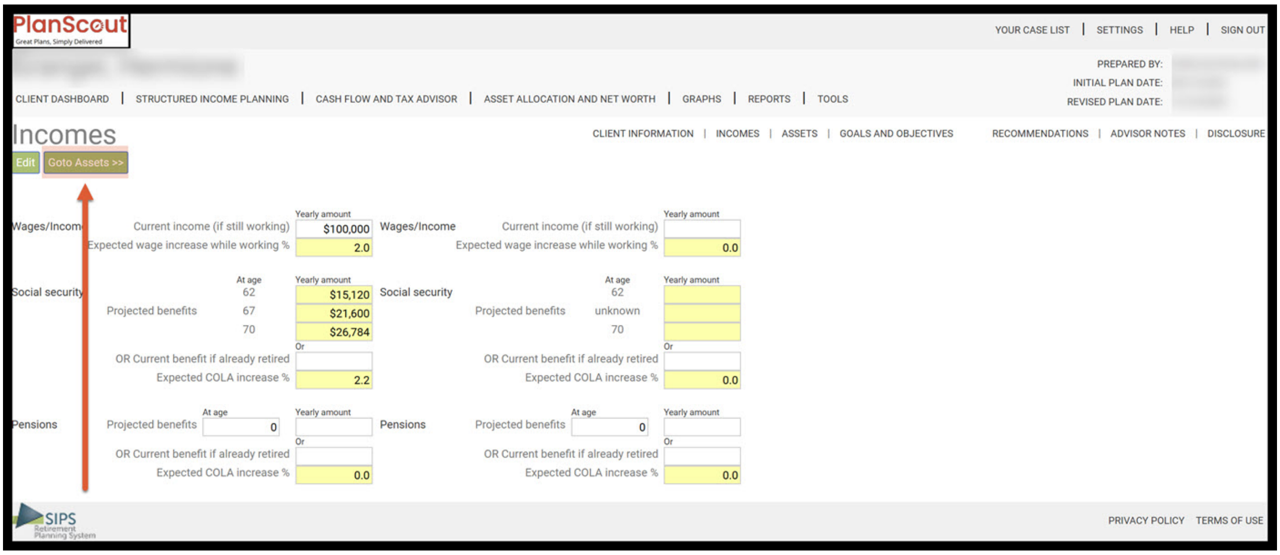
Step 8: Case: Select a case.



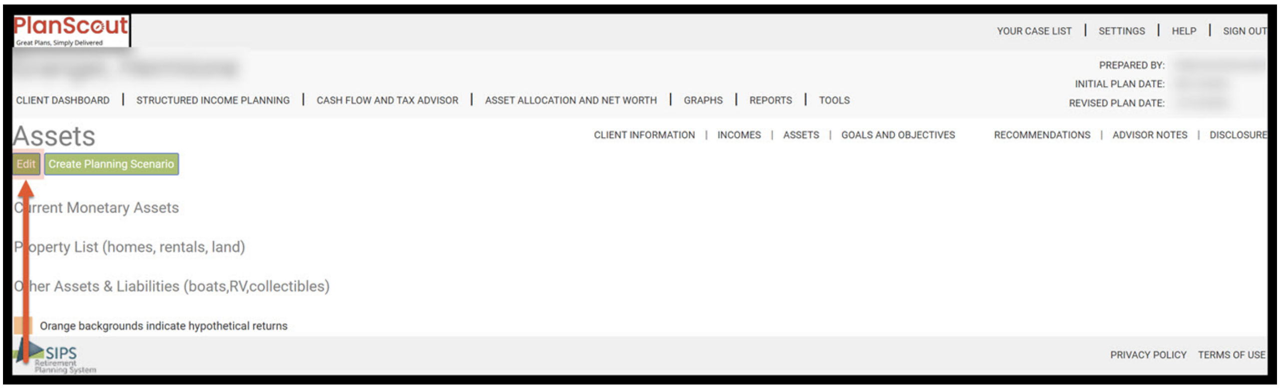
Step 9: GoTo Incomes: Click on the green GoTo Incomes button underneath the Client Information heading.



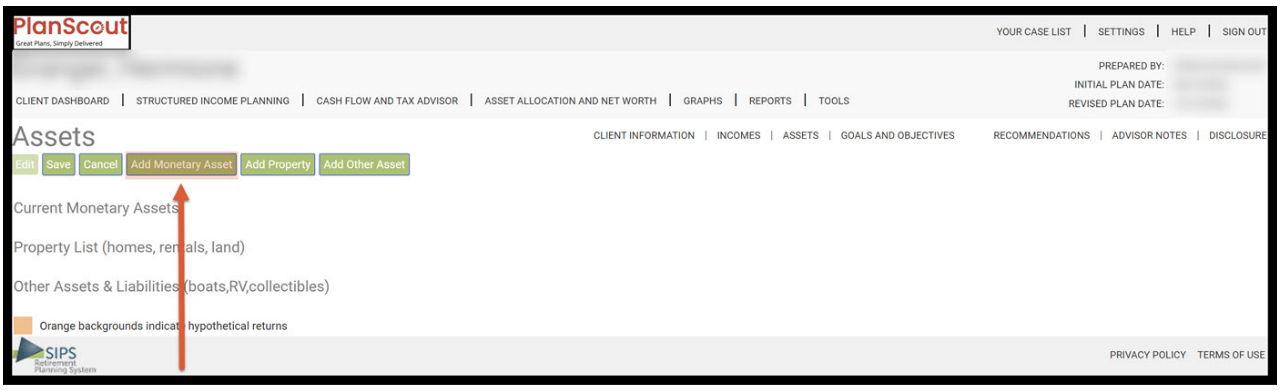
Step 10: GoTo Assets: Click on the green GoTo Aseets button underneath the Incomes heading.



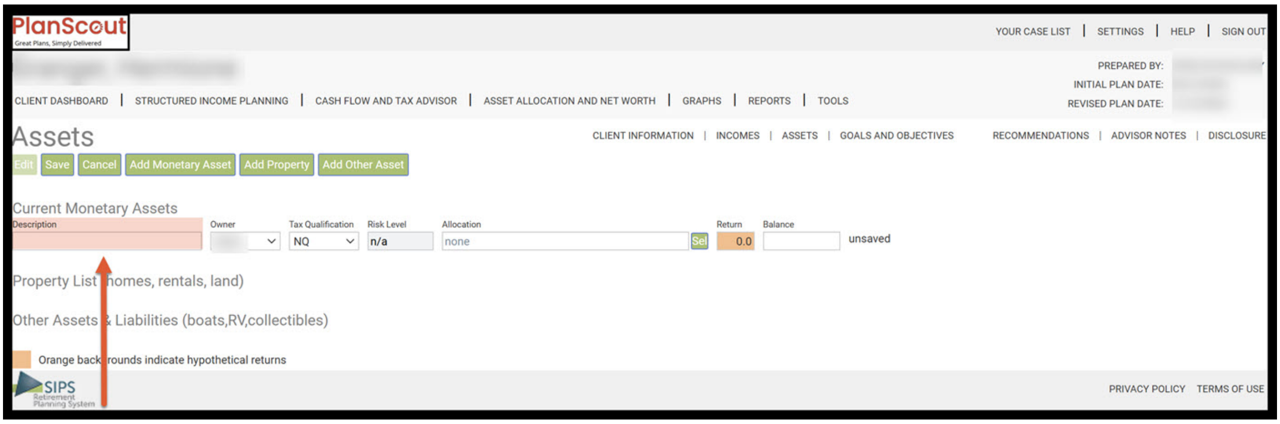
Step 11: Edit: Click on the green Edit button underneath the Assets heading.



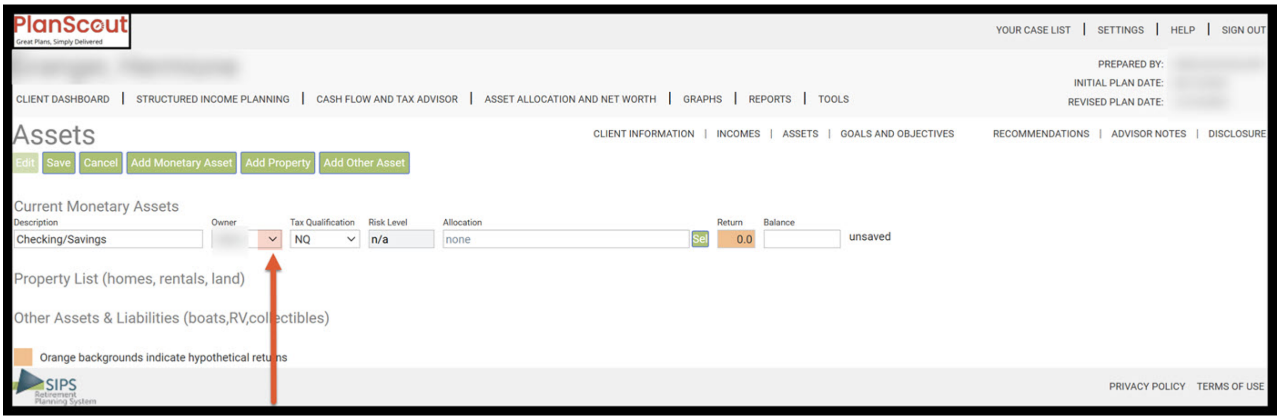
Step 12: Add Monetary Asset: Click on the Green monetary asset button underneath the Assets heading.



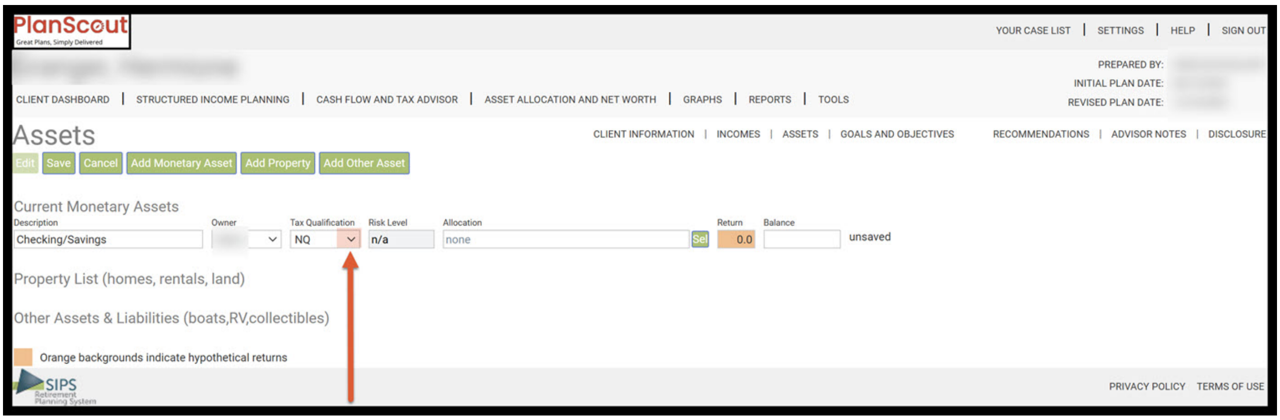
Step 13: Current Monetary Assets Description: Enter in the description.



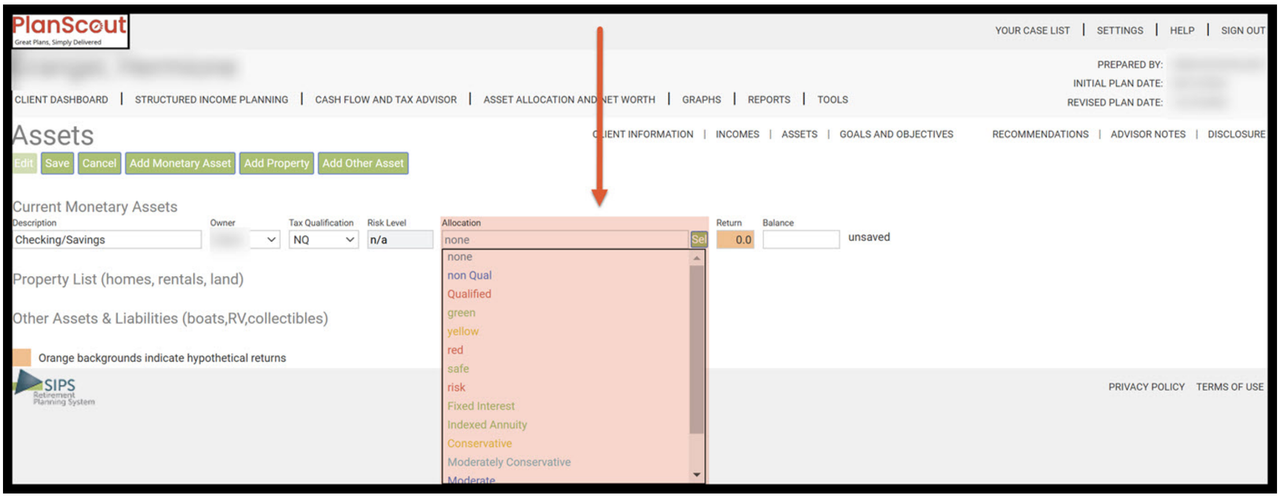
Step 14: Owner: Click on the drop-down carrot arrow and select the owner of the monetary asset account.



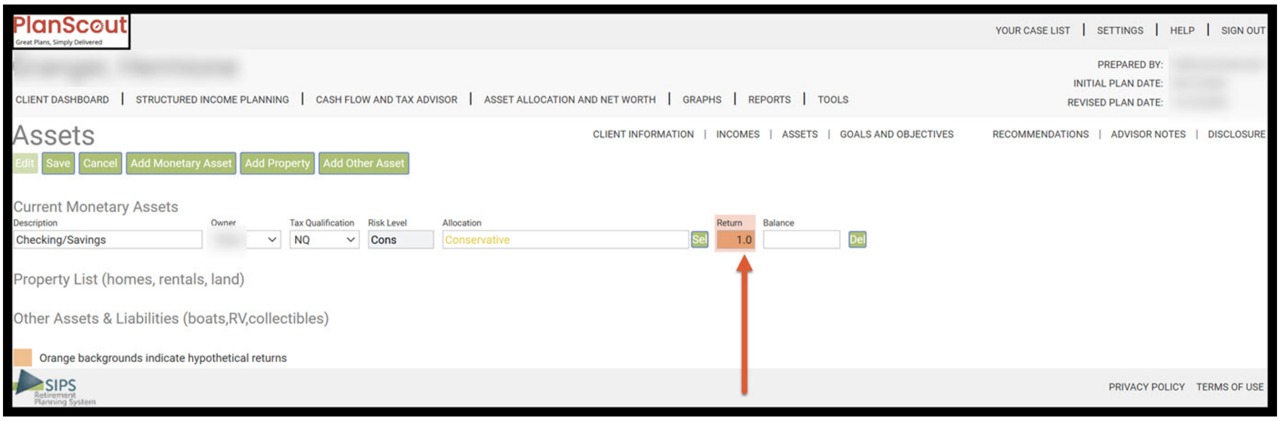
Step 15: Tax Qualification: Click on the drop-down carrot arrow and select the tax qualification of the monetary asset account.



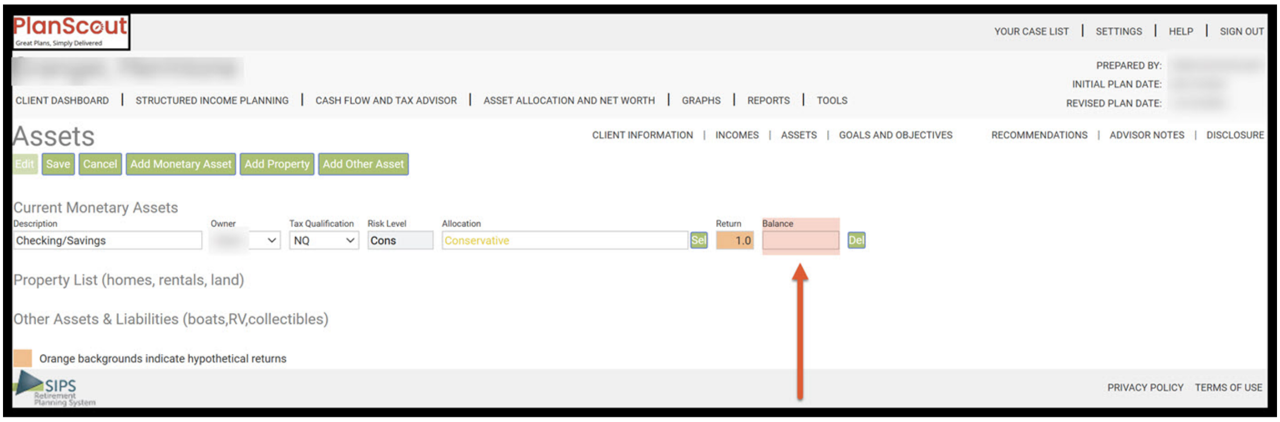
Step 16: Sel: Click on the green Sel button and select an allocation.



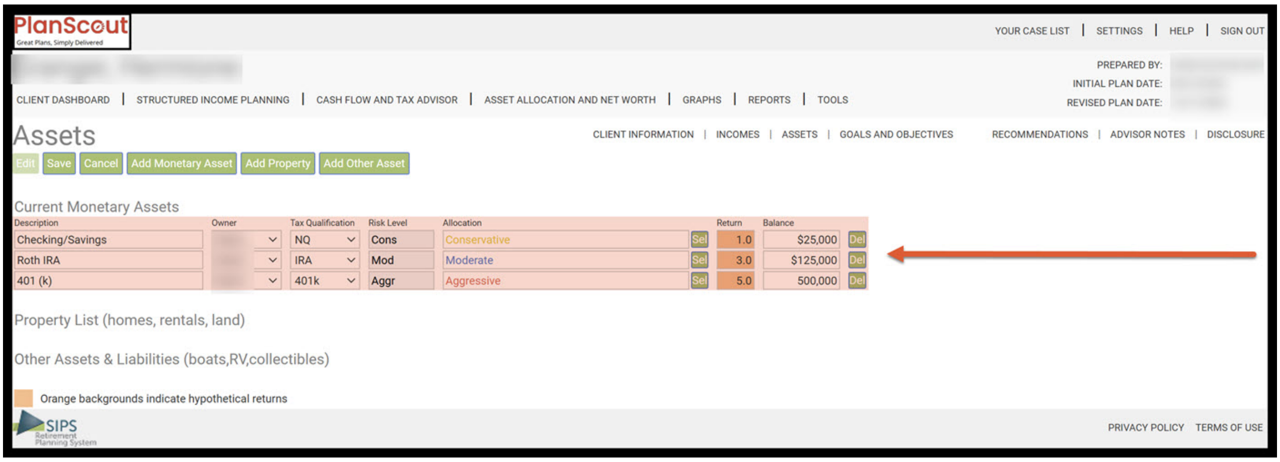
Step 17: Return: The return percentage amount will automatically change to the default percentage amount that was edited on the allocation code list page.



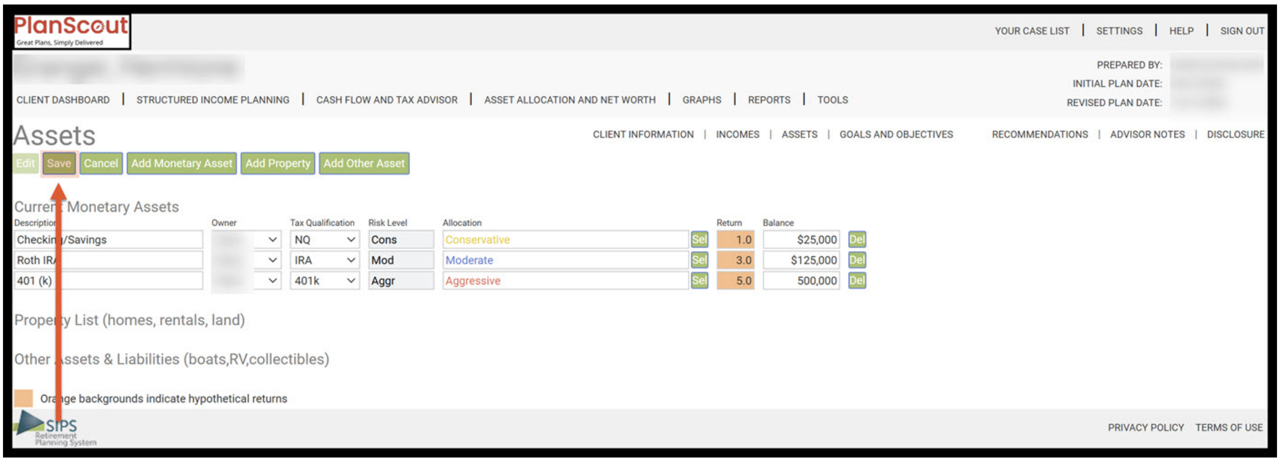
Step 18: Balance: Click on the balance text box and enter in the monetary amount.



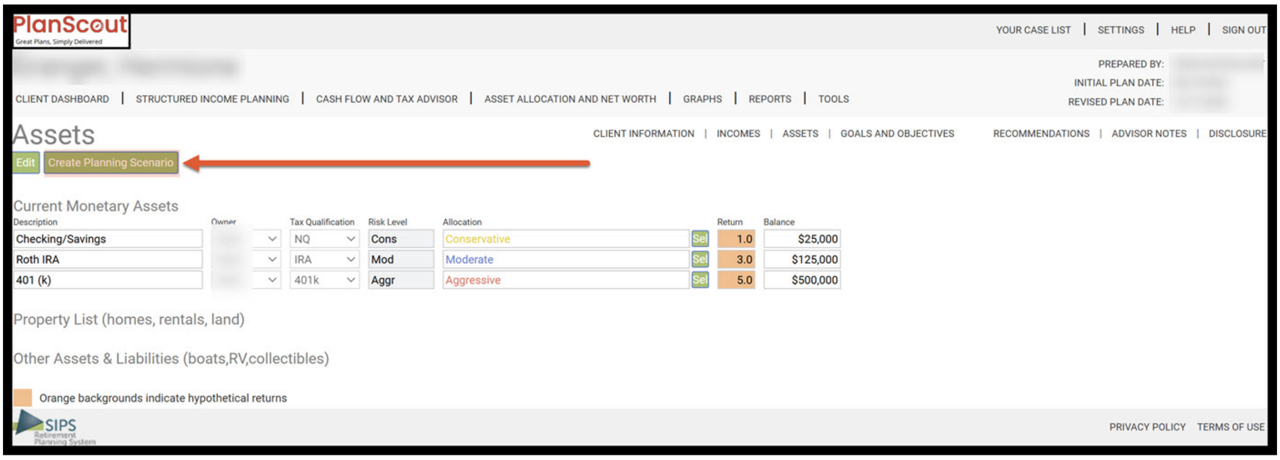
Step 19: Repeat: Repeat steps 12 through 18 if you have more than one monetary asset.



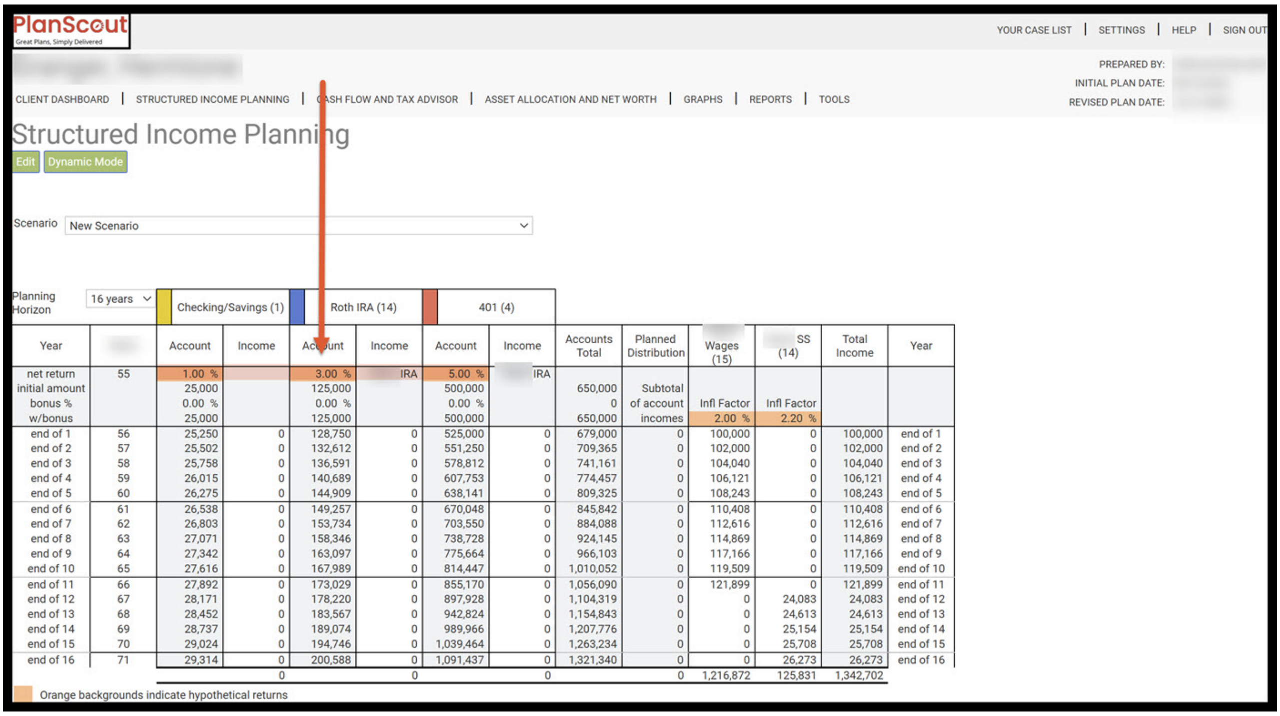
Step 20: Save: Click on the green Save button underneath the Assets heading.



Step 21: Create Planning Scenario: Click on the green Create planning Scenario underneath the Assets page.



Step 22: Structured Income Plan: The accounts should show the default percentage amounts on the net return line.



		Checking/Savings (1)		Roth IRA (14)		401 (4)							
Year		Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (15)	SS (14)	Total Income	Year
net return	55	1.00 %		3.00 %	IRA	5.00 %	IRA						
initial amount		25,000		125,000		500,000		650,000	Subtotal				
bonus %		0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor		
w/bonus		25,000		125,000		500,000		650,000	incomes	2.00 %	2.20 %		
end of 1	56	25,250	0	128,750	0	525,000	0	679,000	0	100,000	0	100,000	end of 1
end of 2	57	25,502	0	132,612	0	551,250	0	709,365	0	102,000	0	102,000	end of 2
end of 3	58	25,758	0	136,591	0	578,812	0	741,161	0	104,040	0	104,040	end of 3
end of 4	59	26,015	0	140,689	0	607,753	0	774,457	0	106,121	0	106,121	end of 4
end of 5	60	26,275	0	144,909	0	638,141	0	809,325	0	108,243	0	108,243	end of 5
end of 6	61	26,538	0	149,257	0	670,048	0	845,842	0	110,408	0	110,408	end of 6
end of 7	62	26,803	0	153,734	0	703,550	0	884,088	0	112,616	0	112,616	end of 7
end of 8	63	27,071	0	158,346	0	738,728	0	924,145	0	114,869	0	114,869	end of 8
end of 9	64	27,342	0	163,097	0	775,664	0	966,103	0	117,166	0	117,166	end of 9
end of 10	65	27,616	0	167,989	0	814,447	0	1,010,052	0	119,509	0	119,509	end of 10
end of 11	66	27,892	0	173,029	0	855,170	0	1,056,090	0	121,899	0	121,899	end of 11
end of 12	67	28,171	0	178,220	0	897,928	0	1,104,319	0	0	24,083	24,083	end of 12
end of 13	68	28,452	0	183,567	0	942,824	0	1,154,843	0	0	24,613	24,613	end of 13
end of 14	69	28,737	0	189,074	0	989,966	0	1,207,776	0	0	25,154	25,154	end of 14
end of 15	70	29,024	0	194,746	0	1,039,464	0	1,263,234	0	0	25,708	25,708	end of 15
end of 16	71	29,314	0	200,588	0	1,091,437	0	1,321,340	0	0	26,273	26,273	end of 16
			0		0		0		0	1,216,872	125,831	1,342,702	

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: support@planscout.com.