

# Editing the Default Percentage Amounts on the Allocation Codes

12/13/2024 3:24 pm 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.

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## Preferences

Save Cancel Select New Logo (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) Upload

User id  
 Old password  
 New password  
 Please re-enter new password  
 Email address

Company Name  
 Company Address  
 Company Address  
 Company Phone  
 Company Website  
 Company Email

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ALLOCATION CODES

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

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## Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Se	0.00	5.00	n/a	0
10904	non Qual	Se	0.00		n/a	0
10905	Qualified	Se	0.00		n/a	0
10906	green	Se	0.00		n/a	0
10907	yellow	Se	0.00		n/a	0
10908	red	Se	0.00		n/a	0
10909	safe	Se	0.00		Fixed Interest	0
10910	risk	Se	0.00		Aggressive	0
10911	Fixed Interest	Se	0.00		Fixed Interest	0
10912	Indexed Annuity	Se	0.00		Indexed Annuity	0
10913	Conservative	Se	0.00		Conservative	0
10914	Moderately Conservative	Se	0.00		Moderately Conservative	0
10915	Moderate	Se	0.00		Moderate	0
10916	Moderately Aggressive	Se	0.00		Moderately Aggressive	0
10917	Aggressive	Se	0.00		Aggressive	0

**Combining Allocation Codes**

You can merge one allocation code into another code by doing the following:

1. Find the id of the code you would like to keep which is located at the left side of the code.
2. Enter this id into the "Replace with id" field of the code you would like to be removed.
3. Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

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ALLOCATION CODES

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

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## Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Se	0.00	5.00	n/a	0
10904	non Qual	Se	0.00		n/a	0
10905	Qualified	Se	0.00		n/a	0
10906	green	Se	0.00		n/a	0
10907	yellow	Se	0.00		n/a	0
10908	red	Se	0.00		n/a	0
10909	safe	Se	0.00		Fixed Interest	0
10910	risk	Se	0.00		Aggressive	0
10911	Fixed Interest	Se	0.00		Fixed Interest	0
10912	Indexed Annuity	Se	0.00		Indexed Annuity	0
10913	Conservative	Se	1		Conservative	0
10914	Moderately Conservative	Se	0.00		Moderately Conservative	0
10915	Moderate	Se	3		Moderate	0
10916	Moderately Aggressive	Se	0.00		Moderately Aggressive	0
10917	Aggressive	Se	5		Aggressive	0

**Combining Allocation Codes**

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ALLOCATION CODES

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

**Combining Allocation Codes**

You can merge one allocation code into another code by doing the following:

1. Find the id of the code you would like to keep which is located at the left side of the code.
2. Enter this id into the 'Replace with id' field of the code you would like to be removed.
3. Press save.

All of the allocation codes or accounts using the 'removed' code will be changed to use the 'replace with' code.

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Blue	0.00	5.00	n/a	0
10904	non Qual	Blue	0.00		n/a	0
10905	Qualified	Red	0.00		n/a	0
10906	green	Green	0.00		n/a	0
10907	yellow	Yellow	0.00		n/a	0
10908	red	Red	0.00		n/a	0
10909	safe	Green	0.00		Fixed Interest	0
10910	risk	Red	0.00		Aggressive	0
10911	Fixed Interest	Green	0.00		Fixed Interest	0
10912	Indexed Annuity	Green	0.00		Indexed Annuity	0
10913	Conservative	Yellow	1.00		Conservative	0
10914	Moderately Conservative	Blue	0.00		Moderately Conservative	0
10915	Moderate	Blue	3.00		Moderate	0
10916	Moderately Aggressive	Blue	0.00		Moderately Aggressive	0
10917	Aggressive	Red	5.00		Aggressive	0

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

**Your Case List**

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
Please use View All Cases or Search Using Selection to view one or more cases				

Rows Per Page: 50 | No records

Step 8: Case: Select a case.



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PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

## Incomes

Edit Goto Assets >>

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
		\$100,000			
	Expected wage increase while working %	2.0		Expected wage increase while working %	0.0

At age	Yearly amount	At age	Yearly amount
62	\$15,120	62	
67	\$21,600	unknown	
70	\$26,784	70	

OR Current benefit if already retired

Expected COLA increase %

2.2

0.0

0.0

0.0

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

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## Assets

Edit Create Planning Scenario

Current Monetary Assets

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

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

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INITIAL PLAN DATE:  
REVISED PLAN DATE:

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## Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

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

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PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings		NQ	n/a	none	0.0		unsaved

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

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

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REVISED PLAN DATE:

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings		NQ	n/a	none	0.0		unsaved

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

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

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PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

### Assets

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings		NQ	n/a	none	0.0		unsaved

Property List (homes, rentals, land)

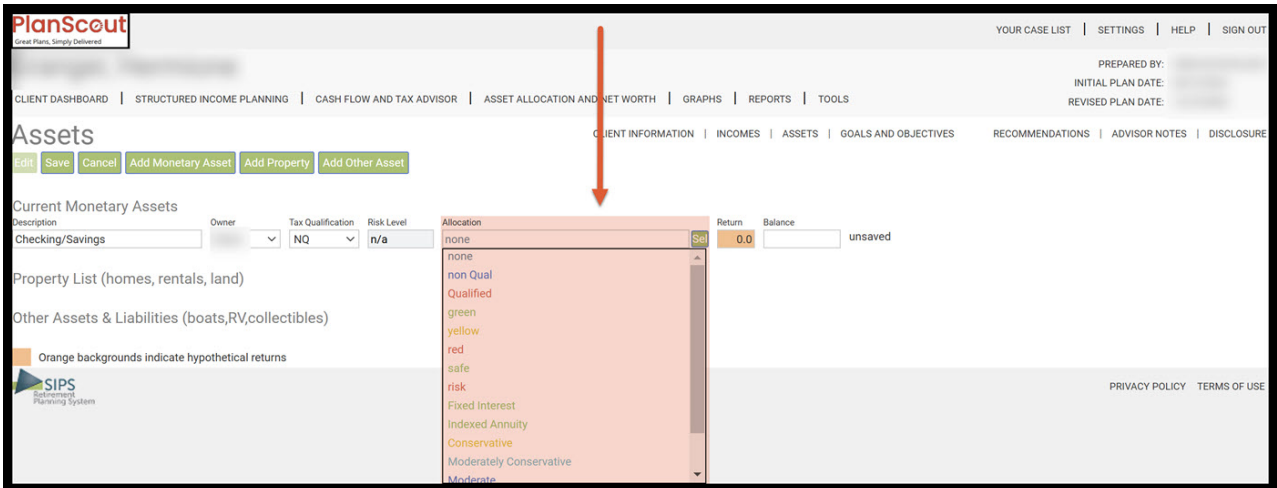
Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

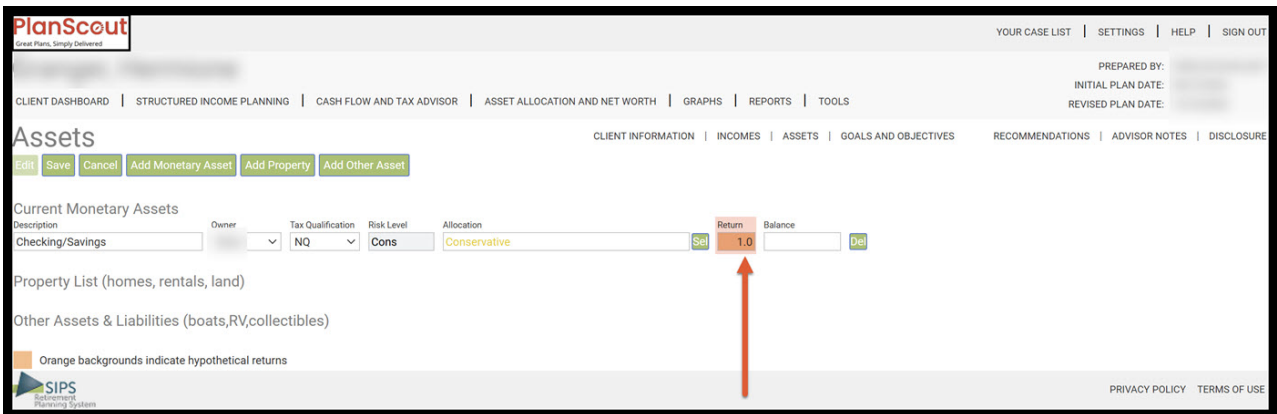
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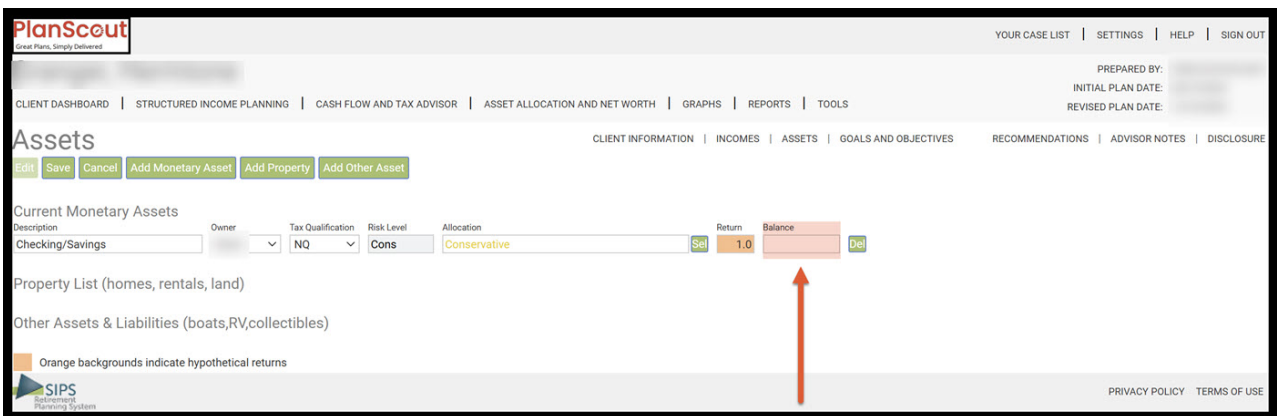
Step 16: Sel: Click on the green Sel button and select an allocation.



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.

The screenshot shows the PlanScout interface with the 'Assets' section active. A table titled 'Current Monetary Assets' is displayed with the following data:

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance	
Checking/Savings		NQ	Cons	Conservative	1.0	\$25,000	Del
Roth IRA		IRA	Mod	Moderate	3.0	\$125,000	Del
401 (k)		401k	Aggr	Aggressive	5.0	500,000	Del

An orange arrow points to the 'Del' button for the 401(k) asset. Below the table are sections for 'Property List (homes, rentals, land)' and 'Other Assets & Liabilities (boats,RV,collectibles)'. A legend indicates that orange backgrounds indicate hypothetical returns.

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

This screenshot is identical to the previous one, but with an orange arrow pointing to the 'Save' button in the top navigation bar of the Assets section.

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

This screenshot is identical to the previous ones, but with an orange arrow pointing to the 'Create Planning Scenario' button located below the 'Assets' heading.



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

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	650,000	0	0	0	0	
initial amount		25,000	125,000		500,000		650,000	0	0	0	0	
bonus % w/bonus		0.00 %	0.00 %		0.00 %		650,000	Subtotal of account incomes	Infl Factor 2.00 %	Infl Factor 2.20 %		
end of 1	56	25,250	0	128,750	0	525,000	679,000	0	100,000	0	100,000	end of 1
end of 2	57	25,502	0	132,612	0	551,250	709,365	0	102,000	0	102,000	end of 2
end of 3	58	25,758	0	136,591	0	578,812	741,161	0	104,040	0	104,040	end of 3
end of 4	59	26,015	0	140,689	0	607,753	774,457	0	106,121	0	106,121	end of 4
end of 5	60	26,275	0	144,909	0	638,141	809,325	0	108,243	0	108,243	end of 5
end of 6	61	26,538	0	149,257	0	670,048	845,842	0	110,408	0	110,408	end of 6
end of 7	62	26,803	0	153,734	0	703,550	884,088	0	112,616	0	112,616	end of 7
end of 8	63	27,071	0	158,346	0	738,728	924,145	0	114,869	0	114,869	end of 8
end of 9	64	27,342	0	163,097	0	775,664	966,103	0	117,166	0	117,166	end of 9
end of 10	65	27,616	0	167,989	0	814,447	1,010,052	0	119,509	0	119,509	end of 10
end of 11	66	27,892	0	173,029	0	855,170	1,056,090	0	121,899	0	121,899	end of 11
end of 12	67	28,171	0	178,220	0	897,928	1,104,319	0	0	24,083	24,083	end of 12
end of 13	68	28,452	0	183,567	0	942,824	1,154,843	0	0	24,613	24,613	end of 13
end of 14	69	28,737	0	189,074	0	989,966	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	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	1,321,340	0	0	26,273	26,273	end of 16
			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: +1-888-449-6917 or [support@planscout.com](mailto:support@planscout.com).