Deleting an Allocation Code

08/28/2026 2:40 pm EDT

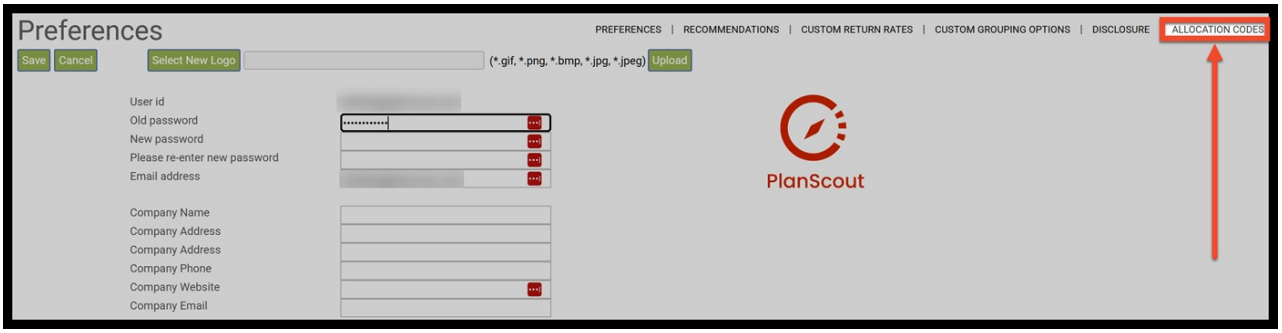
If you are at Administrator status within SIPS you have the ability to delete an Allocation Code. SIPS will only allow you to delete an allocation code that is not currently used within one of your structured income plans. Allocation codes that are eligible for deletion will be marked with a green Del button next to them on the Allocation Code List landing page. For this hypothetical how-to example, we will delete the Very Aggressive Allocation Code. We will start on the Welcome landing page.

Related Articles: *Adding an Allocation Code*, *Changing the Colors of the Allocation Codes, Editing the Default Percentage Amounts on the Allocation Codes, Editing the Maximum Percentage Amounts on the Allocation Codes*

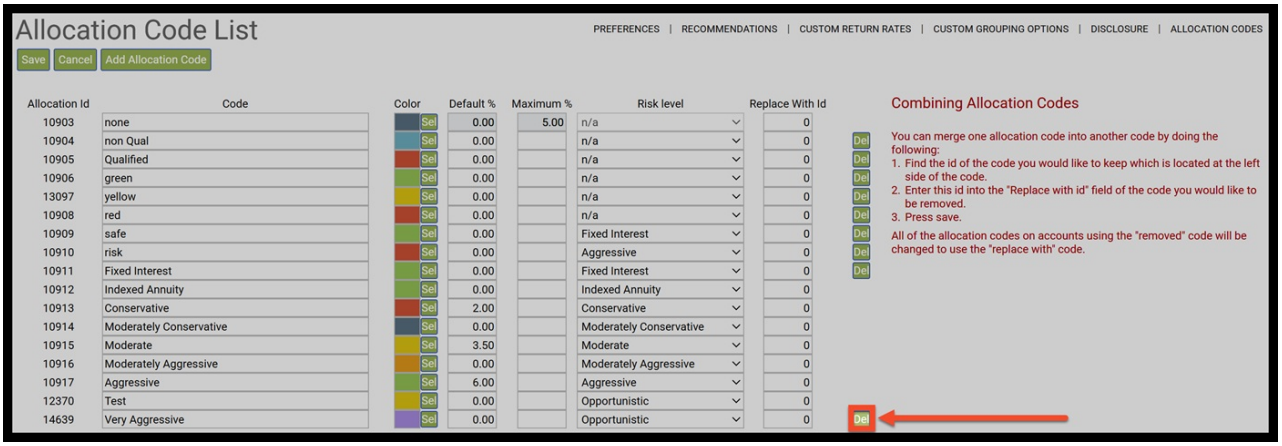
Step 1: Settings: Click on the Settings button located on the right-hand side of your screen. *Related Section:* *Settings*



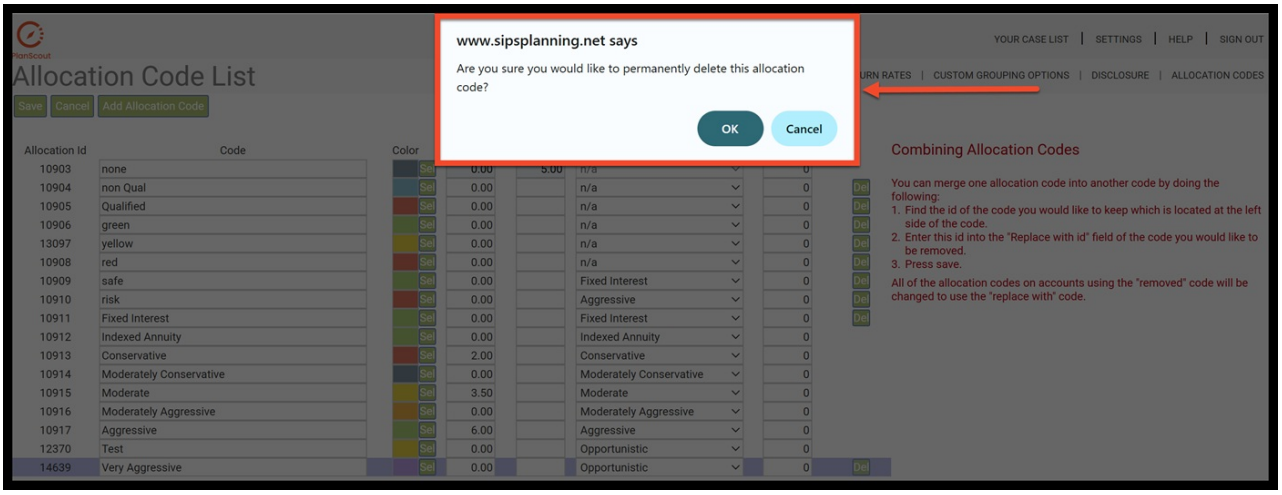
Step 2: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen. Not seeing this option? Check *Having Trouble Accessing the Preferences Under Settings?* to confirm your permission level.



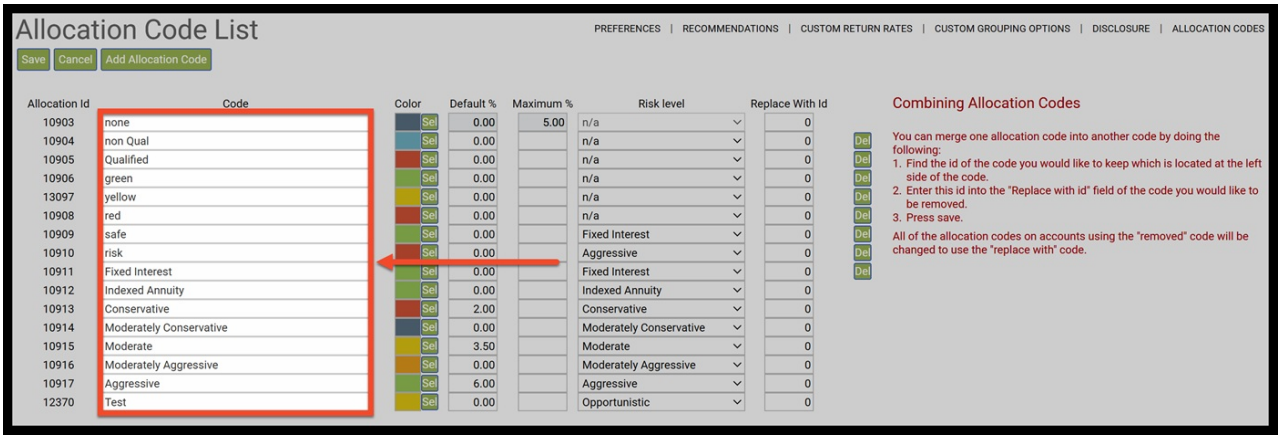
Step 3: Del: Click on the green Del button next to the Allocation Code you would like to delete.



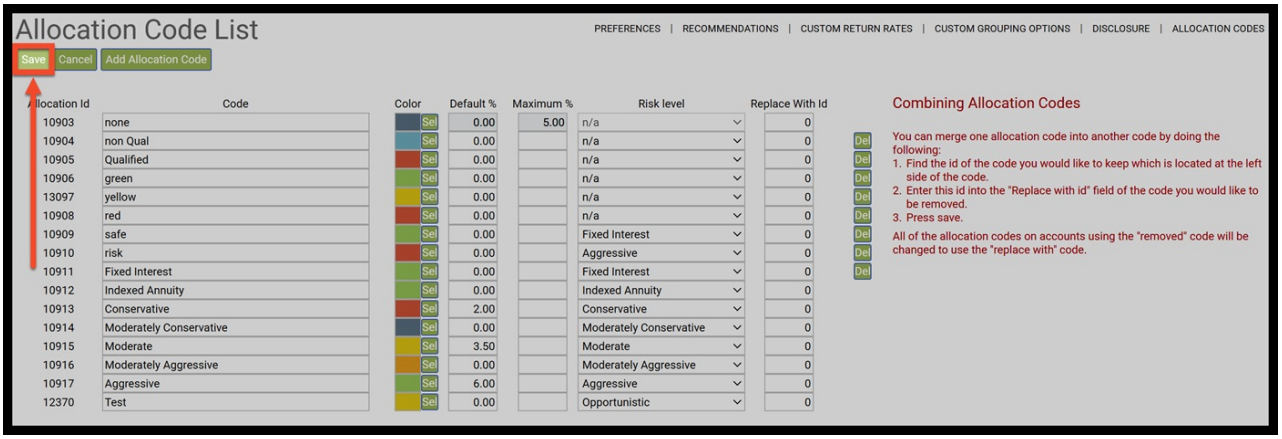
Step 4: Permanent Deletion: After clicking on the green Del button, a sipsplanning.net text box will come up and ask, 'Are you sure you would like to permanently delete this recommendation?' Click the OK button to confirm and permanently delete the allocation code.



Step 5: Permanent Deletion: SIPS has automatically removed the Allocation Code you selected.



Step 6: Save: Click on the green Save button underneath the Allocation Code List heading.



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.