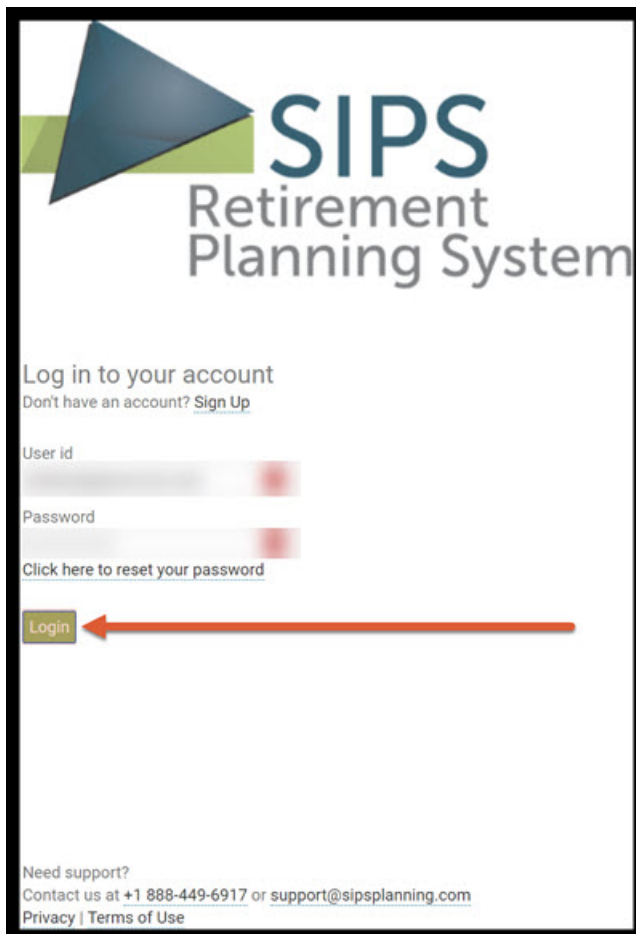


Adding a New Case

08/23/2024 4:38 pm EDT

This guide will go over the big picture of how to add a new case in SIPS. The data that you will need before you can start planning is the clients demographic information (name and age), financial information, (income, assets, and liabilities) and the clients financial goals and objectives. More detailed instructions for each specific page is under the client dashboard section.

Step 1: Logging In: Log into SIPS at <https://www.sipsplanning.net/>.



SIPS
Retirement
Planning System

Log in to your account
Don't have an account? [Sign Up](#)

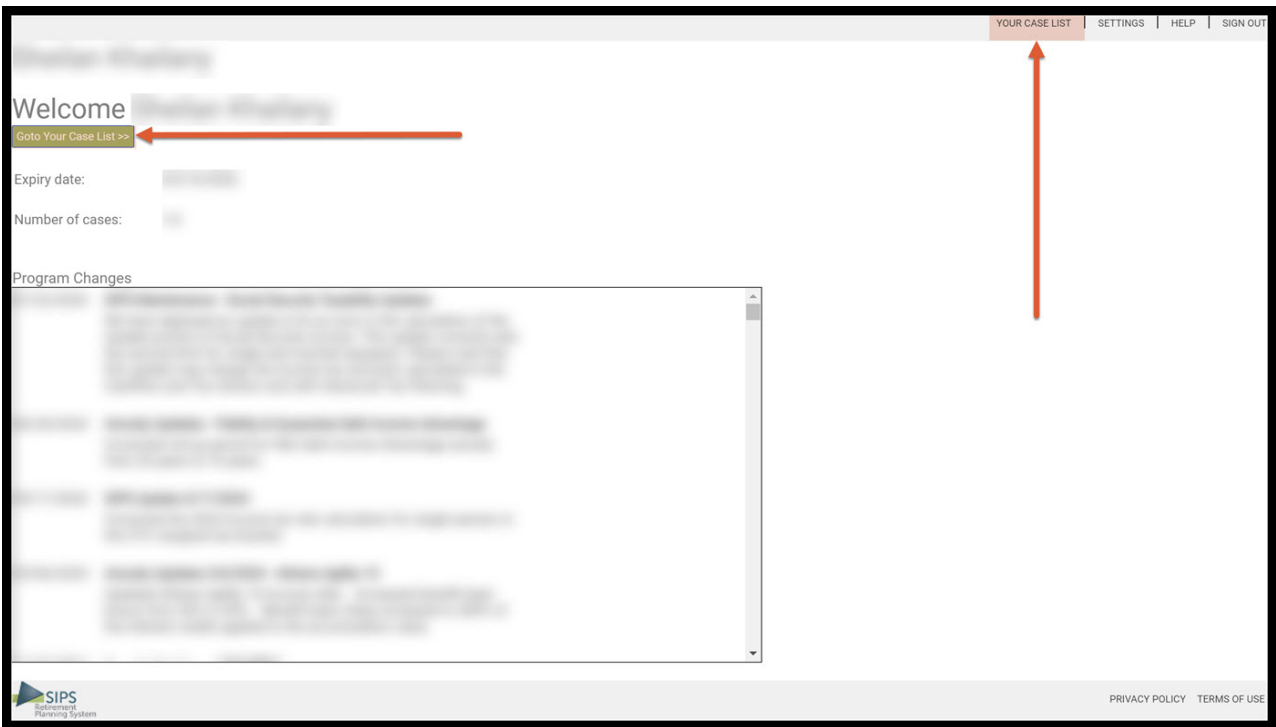
User id

Password

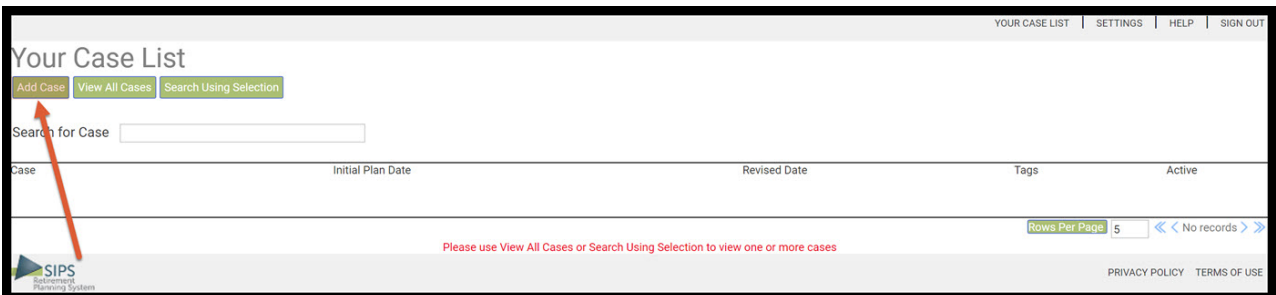
[Click here to reset your password](#)

Need support?
Contact us at +1 888-449-6917 or support@sipsplanning.com
[Privacy](#) | [Terms of Use](#)

Step 2: Welcome Page: There are two different ways to get to the Your Case List Heading screen. You can either click on the GoTo Your Case List button underneath the Welcome heading or click on Your Case List Heading in the upper right hand side. Both will take you to the same Your Case List Page.



Step 3: Add Case: Under the Your Case List heading click on the green add case button.



Step 4: Client Information: Click in the Case Title text box to start entering in the information. The yellow text boxes are mandatory text boxes that need data to be entering into to proceed to the next page.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY: []
INITIAL PLAN DATE: []
REVISED PLAN DATE: []

Client Information

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title []
Description []

Selection tags [] Active

Client one: Last [] First [] Short name Client1
Date of birth [] Initial plan age 0
Current age 0 Retirement age 0 Gender Male

Client two: Last [] First [] Short name Client2
Date of birth [] Initial plan age 0
Current age 0 Retirement age 0 Gender Female

Initial plan date []
Revision date []
Address []
City, State, Zip []
Email []
Phone []
Cell Phone []
Cell Phone []

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 5: Add Beneficiary: If the client has beneficiaries, click on the green add beneficiary button.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY: []
INITIAL PLAN DATE: []
REVISED PLAN DATE: []

Client Information

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title []
Description []

Selection tags [] Active

Client one: Last [] First [] Short name Client1
Date of birth [] Initial plan age 0
Current age 0 Retirement age 0 Gender Male

Client two: Last [] First [] Short name Client2
Date of birth [] Initial plan age 0
Current age 0 Retirement age 0 Gender Female

Initial plan date []
Revision date []
Address []
City, State, Zip []
Email []
Phone []
Cell Phone []
Cell Phone []

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY: []
INITIAL PLAN DATE: []
REVISED PLAN DATE: []

Client Information

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title []
Description []

Selection tags [] Active

Client one: Last [] First [] Short name Client1
Date of birth [] Initial plan age 0
Current age [] Retirement age [] Gender Male

Client two: Last [] First [] Short name Client2
Date of birth [] Initial plan age 0
Current age 0 Retirement age 0 Gender Female

Initial plan date []
Revision date []
Address []
City, State, Zip []
Email []
Phone []
Cell Phone []
Cell Phone []

List Clients Beneficiaries (optional)

Name [] [Del](#) [unsaved](#)

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 6: Save: Click on the green save button to proceed to the next page.

The screenshot shows the 'Client Information' form in a web application. At the top, there is a navigation bar with links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this is a secondary navigation bar with 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The main heading is 'Client Information', with sub-headings for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The form contains several sections: 'Case Title' and 'Description' at the top; 'Client one' and 'Client two' sections with fields for 'Last', 'First', 'Date of birth', 'Initial plan age', 'Current age', 'Retirement age', and 'Gender'; and a 'List Clients Beneficiaries (optional)' section with a 'Name' field and a 'Del' button. A red arrow points to the 'Save' button in the top left corner of the form area. The bottom of the page features the 'SIPS Retirement Planning System' logo and 'PRIVACY POLICY' and 'TERMS OF USE' links.

Step 7: Goto Incomes: Click on the green GoTo Incomes underneath the Client Information subheading.

This screenshot is identical to the previous one, showing the 'Client Information' form. A red arrow now points to the 'GoTo Incomes >>' button, which is located in the top left corner of the form area, below the 'Edit' button. The rest of the form and navigation elements remain the same.

Step 8: Edit: Click on the green Edit button underneath the Incomes subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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
 Expected wage increase while working % Expected wage increase while working %

Social security At age 62 Yearly amount Social security At age 62 Yearly amount
 Projected benefits 67 Projected benefits 66
 70 Projected benefits 70
 Or Or
 OR Current benefit if already retired OR Current benefit if already retired
 Expected COLA increase % Expected COLA increase %

Pensions At age 0 Yearly amount Pensions At age 0 Yearly amount
 Projected benefits Projected benefits
 Or Or
 OR Current benefit if already retired OR Current benefit if already retired
 Expected COLA increase % Expected COLA increase %

 [PRIVACY POLICY](#) [TERMS OF USE](#)

Step 9: Radio Button: Select which amounts you will be putting the monetary data in, yearly or monthly amount.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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](#) [Save](#) [Cancel](#)

Enter monthly amounts Enter yearly amounts

Wages/Income Current income (if still working) Yearly amount Wages/Income Current income (if still working) Yearly amount
 Expected wage increase while working % Expected wage increase while working %

Social security At age 62 Yearly amount Social security At age 62 Yearly amount
 Projected benefits 67 Projected benefits 66
 70 Projected benefits 70
 Or Or
 OR Current benefit if already retired OR Current benefit if already retired
 Expected COLA increase % Expected COLA increase %

Pensions At age 0 Yearly amount Pensions At age 0 Yearly amount
 Projected benefits Projected benefits
 Or Or
 OR Current benefit if already retired OR Current benefit if already retired
 Expected COLA increase % Expected COLA increase %

 [PRIVACY POLICY](#) [TERMS OF USE](#)

Step 10: Wages/Income: Enter in the data in the wages/income sections.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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](#) [Save](#) [Cancel](#)

Enter monthly amounts Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	150,000				
Expected wage increase while working %	2.2		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	62	
	67			66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	0.0		Expected COLA increase %	0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	0.0		Expected COLA increase %	0.0	

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 11: Social Security: Enter in the data for the Social Security sections.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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](#) [Save](#) [Cancel](#)

Enter monthly amounts Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	150,000				
Expected wage increase while working %	2.2		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	28,000	Projected benefits	62	
	67			66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	3.2		Expected COLA increase %	0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0		Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	0.0		Expected COLA increase %	0.0	

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 12: Pensions: Enter in the data for pensions.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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](#) [Save](#) [Cancel](#)

Enter monthly amounts Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	150,000				
Expected wage increase while working %	2.2		Expected wage increase while working %	0.0	

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	28,000	Projected benefits	62	
	67			66	
	70			70	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	3.2		Expected COLA increase %	0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	30,000	Projected benefits	0	
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %	2.2		Expected COLA increase %	0.0	

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 13: Save: Click on the green Save button underneath the Incomes subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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](#) [Save](#) [Cancel](#)

Enter monthly amounts Enter yearly amounts

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	150,000				
	Expected wage increase while working %	2.2		Expected wage increase while working %	0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount	
Projected benefits	62	28,000	Projected benefits	62		
	67			Projected benefits	66	
	70				Projected benefits	70
Or			Or			
OR Current benefit if already retired			OR Current benefit if already retired			
Expected COLA increase %			Expected COLA increase %			
		3.2			0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	30,000	Projected benefits	0	
				Projected benefits	
Or			Or		
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		
		2.2			0.0

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 14: Goto Assets: Click on the green GoTo Assets button underneath the Incomes subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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
	\$150,000				
	Expected wage increase while working %	2.2		Expected wage increase while working %	0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount	
Projected benefits	62	\$28,000	Projected benefits	62		
	67	\$40,000		Projected benefits	66	
	70	\$49,600			Projected benefits	70
Or			Or			
OR Current benefit if already retired			OR Current benefit if already retired			
Expected COLA increase %			Expected COLA increase %			
		3.2			0.0	

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	65	\$30,000	Projected benefits	0	
				Projected benefits	
Or			Or		
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %			Expected COLA increase %		
		2.2			0.0

SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

Step 15: Edit: Click on the green Edit button underneath the Assets subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

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

Assets

[Edit](#) [Create Planning Scenario](#)

Current Monetary Assets

Property List (homes, rentals, land)

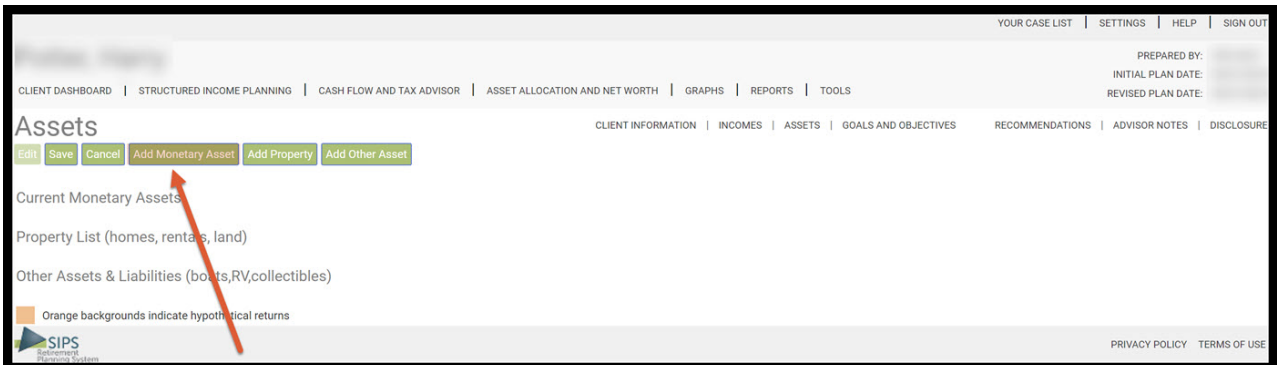
Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

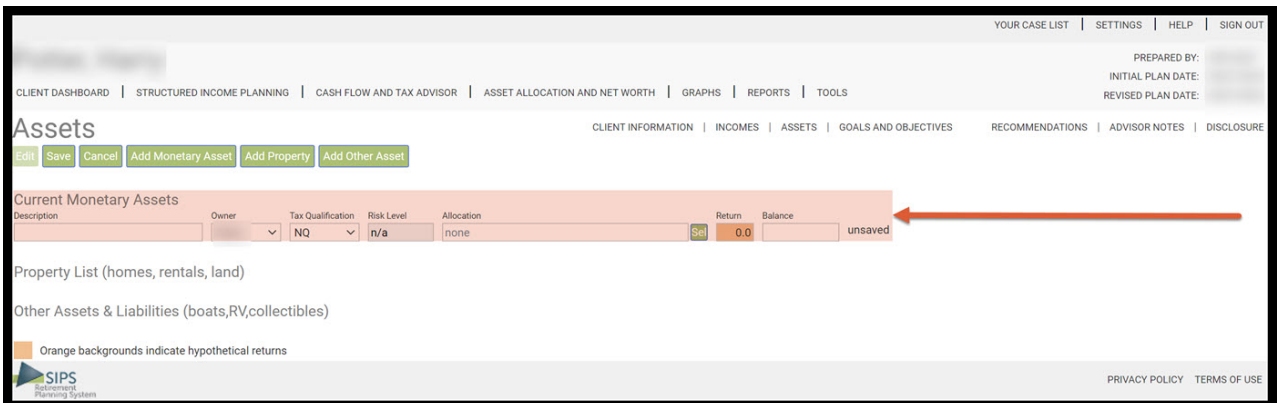
SIPS Retirement Planning Systems

PRIVACY POLICY | TERMS OF USE

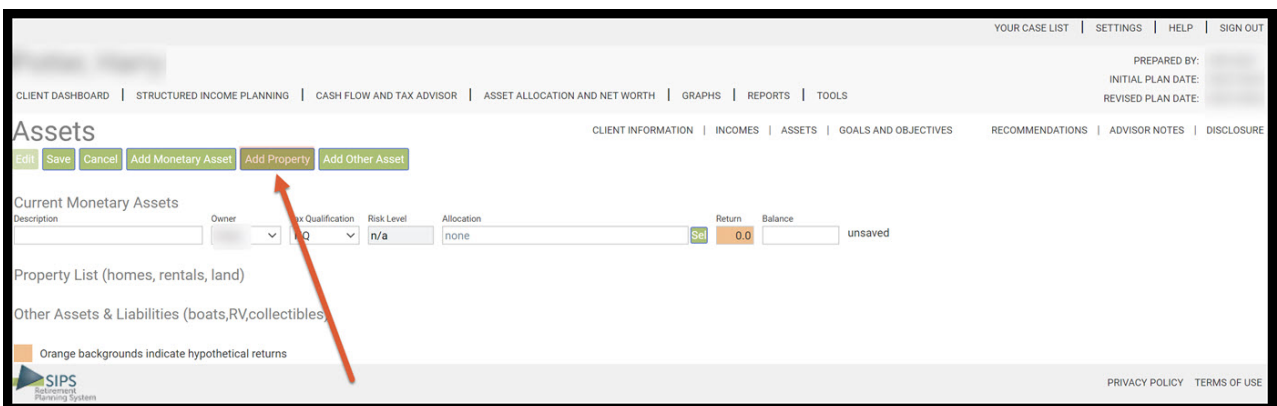
Step 16: Add Monetary Assets: Click on the green Add monetary Assets button underneath the Assets subheading.



Step 17: Current Monetary Assets: Filter in the data.



Step 18: Add Property: Click on the green add property button underneath the Assets subheading if there is property to be added.



Step 19: Property List Description: Filter in the in data.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: SIPS HELP
INITIAL PLAN DATE: 08/07/2024
REVISED PLAN DATE: 08/07/2024

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

Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance

Property List (homes, rentals, land)

Description	Value	Amount owed

unsaved

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 20: Add Other Asset: Click on the green Add Other Asset if there are other assets that to be added.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance

Property List (homes, rentals, land)

Description	Value	Amount owed

unsaved

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 21: Other Asset description: Filter in the data.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Assets

Edit Save Cancel Add Monetary Asset Add Property Add Other Asset

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance

Property List (homes, rentals, land)

Description	Value	Amount owed

Other Assets & Liabilities (boats,RV,collectibles)

Description	Value	Amount owed

unsaved

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 22: Save: Click on the green Save button underneath the Assets subheading.

The screenshot shows the 'Assets' section of the SIPS software. At the top, there is a navigation bar with 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this is a secondary navigation bar with 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The main heading is 'Assets', with sub-headings 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. Below the heading are buttons for 'Edit', 'Save', 'Cancel', 'Add Monetary Asset', 'Add Property', and 'Add Other Asset'. A red arrow points to the 'Save' button. The main content area is divided into three sections: 'Current Monetary Assets', 'Property List (homes, rentals, land)', and 'Other Assets & Liabilities (boats, RV, collectibles)'. Each section contains a table with columns for Description, Owner, Tax Qualification, Risk Level, Allocation, Return, and Balance. The 'Current Monetary Assets' table has four rows, each with a 'Del' button. The 'Property List' table has two rows, each with a 'Del' button. The 'Other Assets & Liabilities' table has one row with a 'Del' button. At the bottom left, there is a note: 'Orange backgrounds indicate hypothetical returns'. The SIPS logo and 'PRIVACY POLICY' / 'TERMS OF USE' are at the bottom right.

Step 23: Create Planning Scenario: Click on the green create planning scenario button underneath the Assets subheading.

The screenshot shows the 'Assets' section of the SIPS software. At the top, there is a navigation bar with 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this is a secondary navigation bar with 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The main heading is 'Assets', with sub-headings 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. Below the heading are buttons for 'Edit' and 'Create Planning Scenario'. A red arrow points to the 'Create Planning Scenario' button. The main content area is divided into three sections: 'Current Monetary Assets', 'Property List (homes, rentals, land)', and 'Other Assets & Liabilities (boats, RV, collectibles)'. Each section contains a table with columns for Description, Owner, Tax Qualification, Risk Level, Allocation, Return, and Balance. The 'Current Monetary Assets' table has four rows, each with a 'Del' button. The 'Property List' table has two rows, each with a 'Del' button. The 'Other Assets & Liabilities' table has one row with a 'Del' button. At the bottom left, there is a note: 'Orange backgrounds indicate hypothetical returns'. The SIPS logo and 'PRIVACY POLICY' / 'TERMS OF USE' are at the bottom right.

Step 24: Structured Income Planning Page: view the structured income plan.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

Edit Dynamic Mode

Scenario: New Scenario (1)

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension (3)	Total Income	Year
net return															
initial amount										Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor		
bonus % w/bonus															
end of 1										0					end of 1
end of 2										0					end of 2
end of 3										0					end of 3
end of 4										0					end of 4
end of 5										0					end of 5
end of 6										0					end of 6
end of 7										0					end of 7
end of 8										0					end of 8
end of 9										0					end of 9
end of 10										0					end of 10
end of 11										0					end of 11
end of 12										0					end of 12
end of 13										0					end of 13
end of 14										0					end of 14
end of 15										0					end of 15
end of 16										0					end of 16

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

Step 25: Log Out: To log out of SIPS click on the Sign Out heading that is located in the upper righthand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

Structured Income Planning

Edit Dynamic Mode

Scenario: New Scenario (1)

Planning Horizon: 16 years

Year	Account	Income	Account	Income	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages (3)	SS	Pension (3)	Total Income	Year
net return															
initial amount										Subtotal of account incomes	Infl Factor	Infl Factor	Infl Factor		
bonus % w/bonus															
end of 1										0					end of 1
end of 2										0					end of 2
end of 3										0					end of 3
end of 4										0					end of 4
end of 5										0					end of 5
end of 6										0					end of 6
end of 7										0					end of 7
end of 8										0					end of 8
end of 9										0					end of 9
end of 10										0					end of 10
end of 11										0					end of 11
end of 12										0					end of 12
end of 13										0					end of 13
end of 14										0					end of 14
end of 15										0					end of 15
end of 16										0					end of 16

Orange backgrounds indicate hypothetical returns

SIPS Retirement Planning System

PRIVACY POLICY | TERMS OF USE

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.