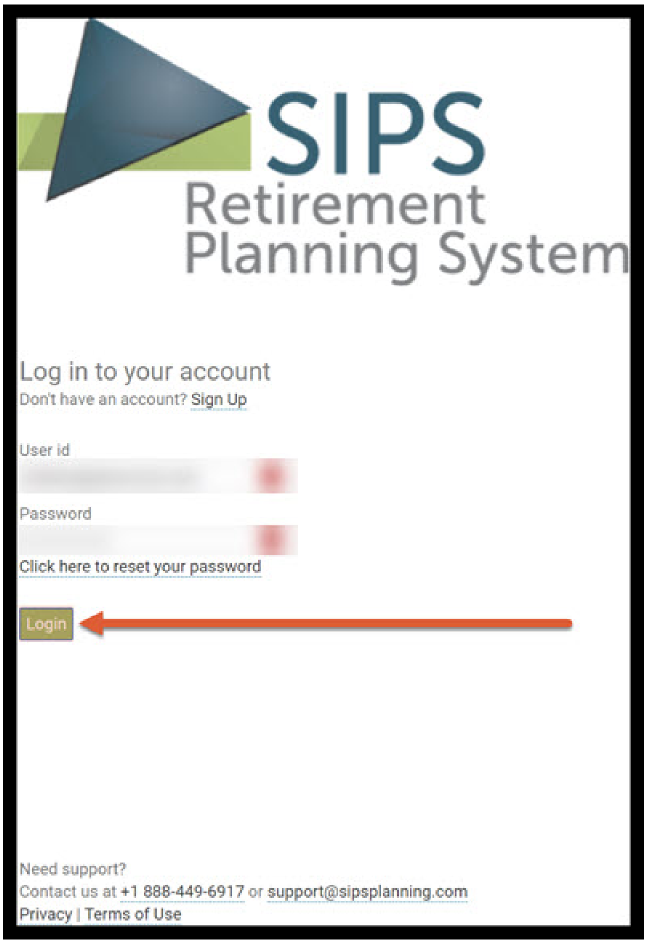
Adding a New Case

08/23/2024 4:38 pm EDT

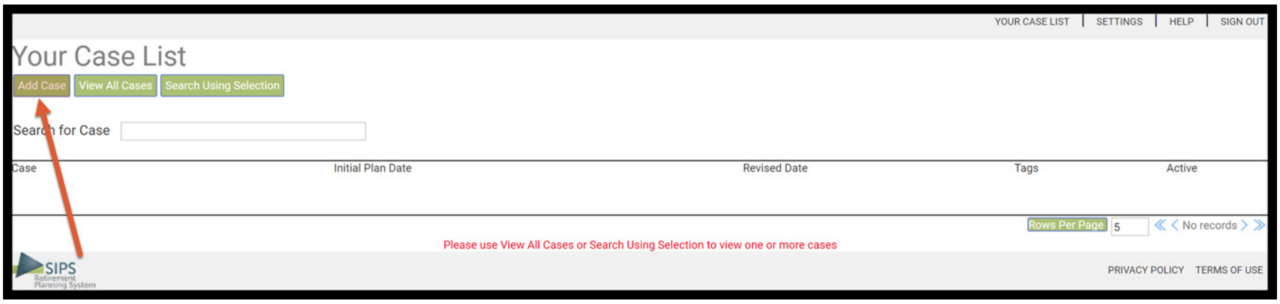
This guide will go over the big picture of how to add a new case in SIPS. The data that you will need before you can start planning is the clients demogrpahic information (name and age), financial information, (income, assets, and liabilities) and the clients financial goals and objectives. More detailed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

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

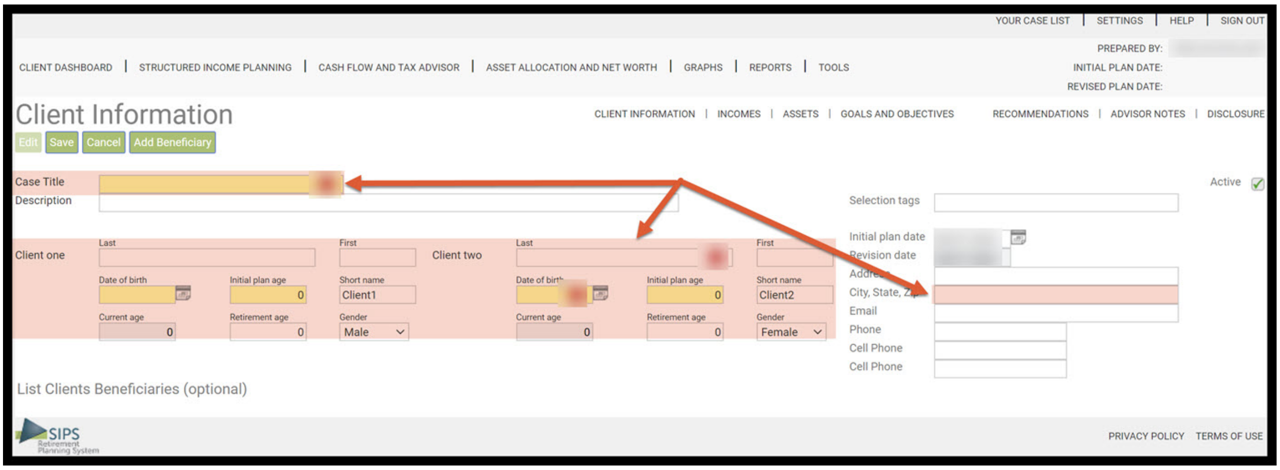


Step 2: Welcome Page: There are two different ways to get to the Your Case List Heading screen. You can either click on the GoTo Your Case List button underneath the Welcome heading or click on Your Case List Heading in the upper right hand side. Both will take you to the same Your Case List Page.

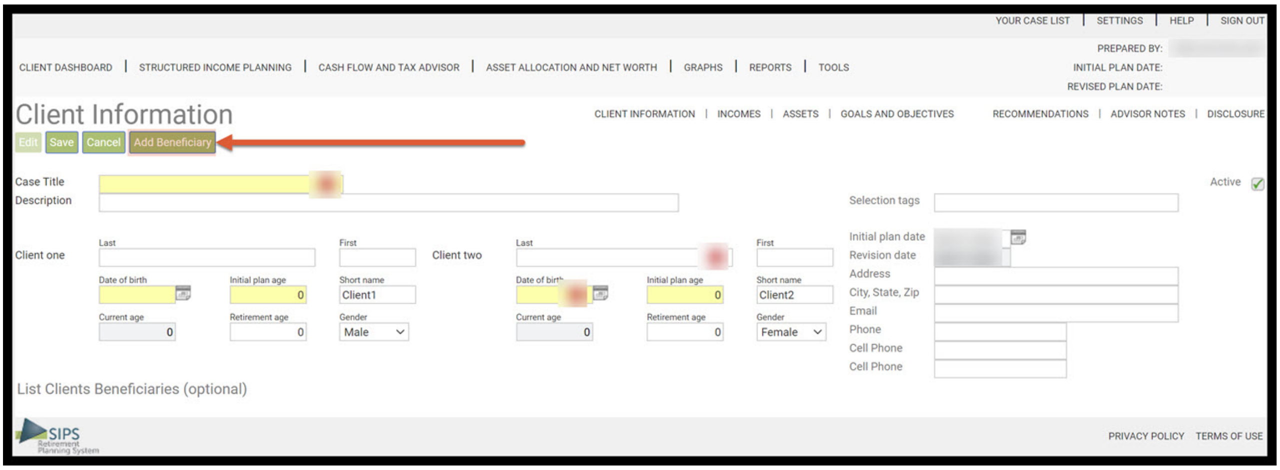
Step 3: Add Case: Under the Your Case List heading click on the green add case button.

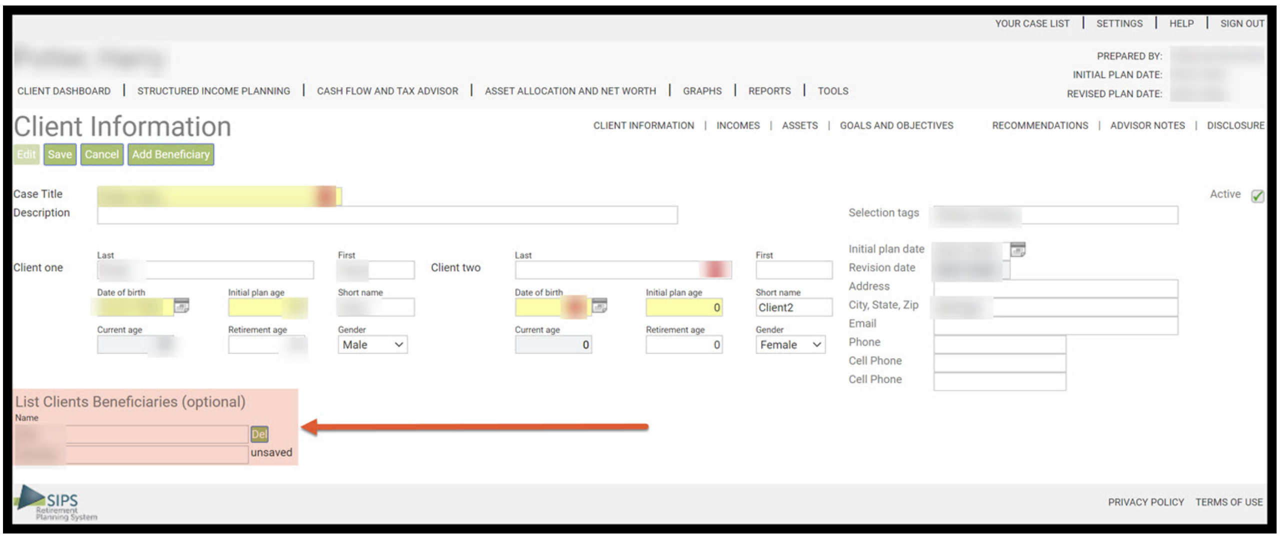


Step 4: Client Information: Click in the Case Title text box to start entering in the information. The yellow text boxes are mandatory text boxes that need data to be enering into to proceed to the next page.

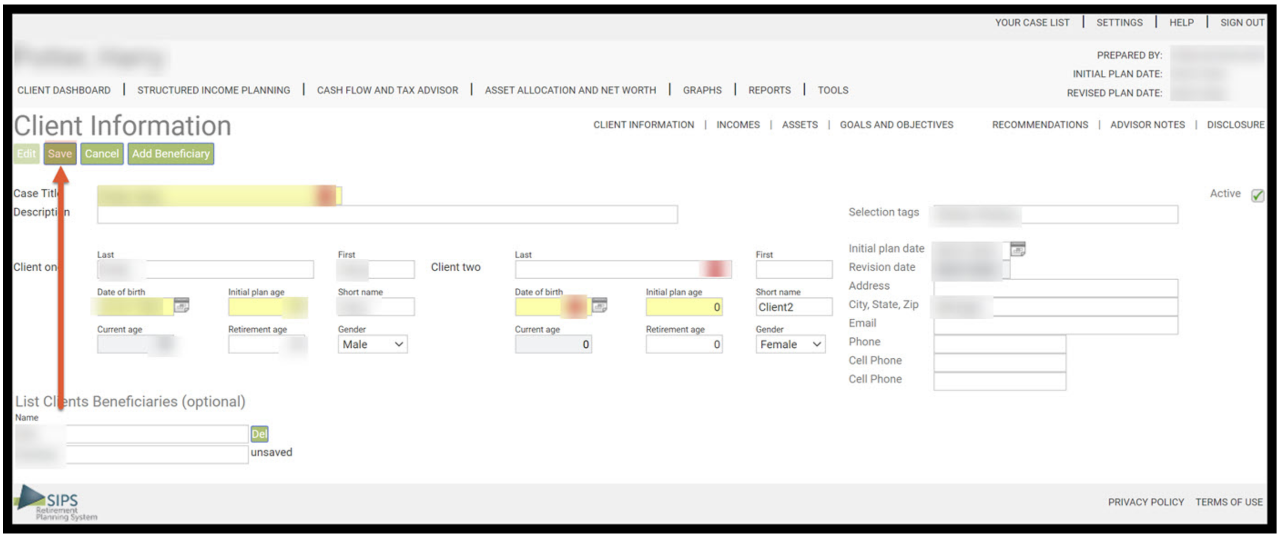


Step 5: Add Beneficiary: If the client has beneficiaries, click on the green add beneificary button.

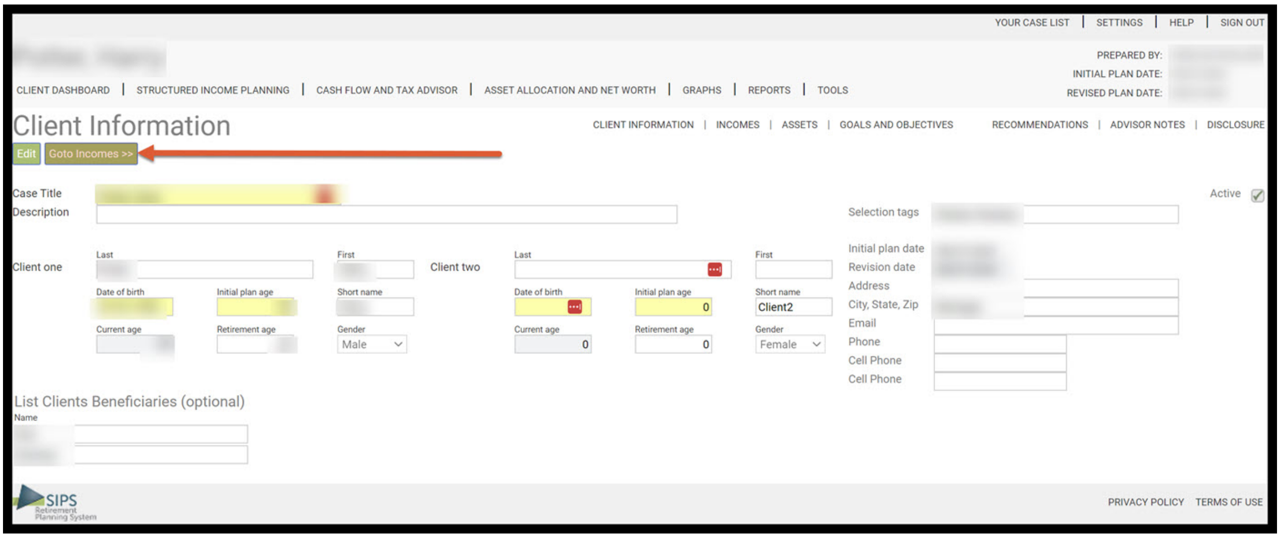




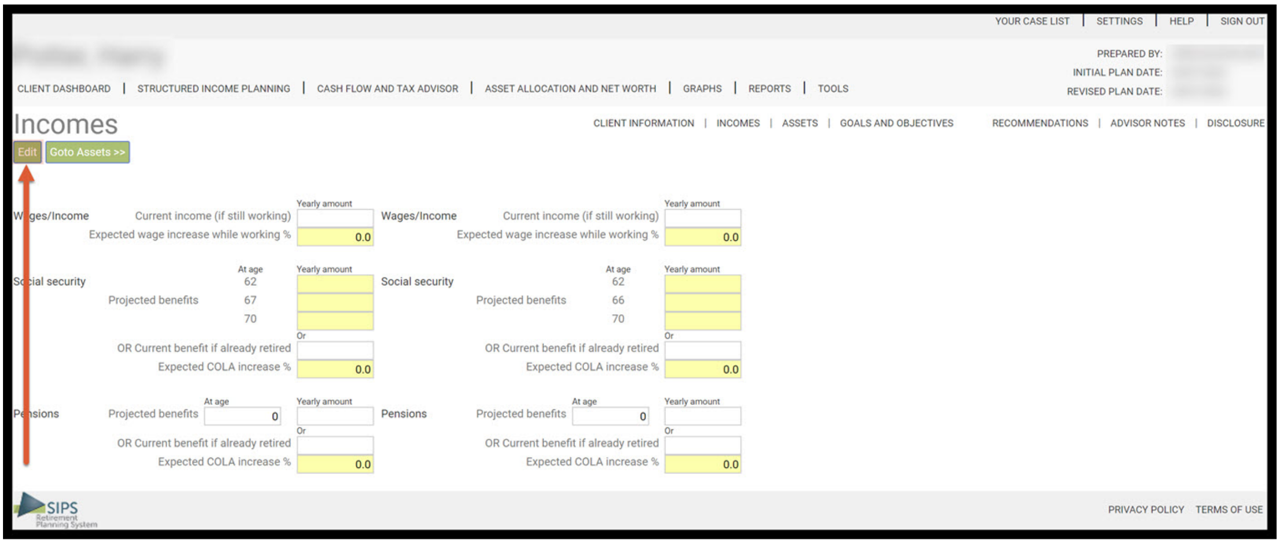
Step 6: Save: Click on the green save button to proceed to the next page.



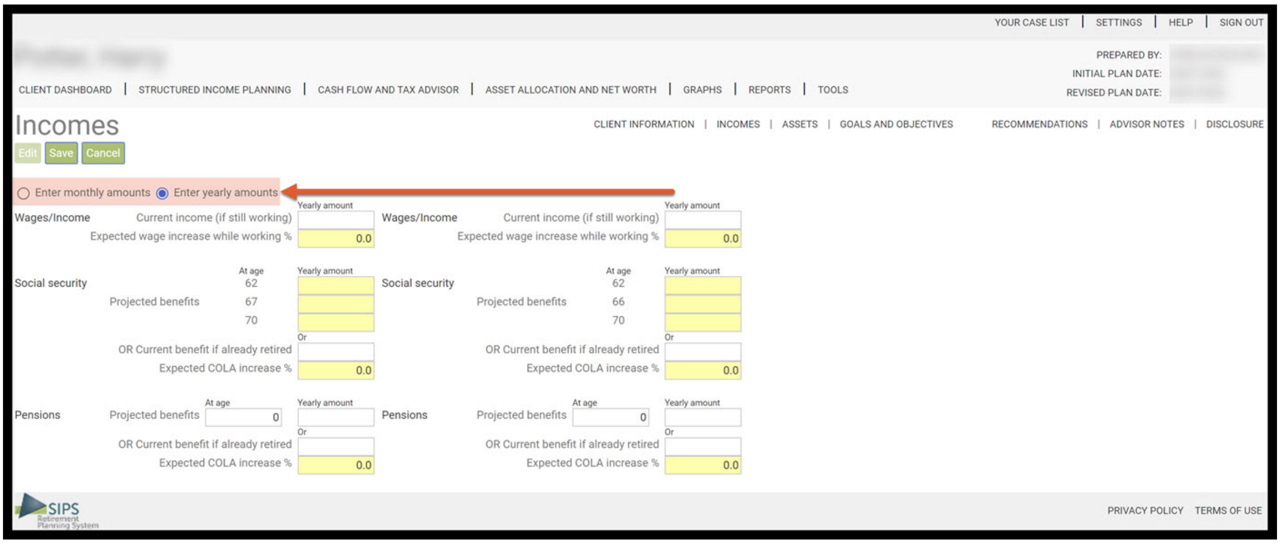
Step 7: Goto Incomes: Click on the green GoTo Incomes underneath the Client Information subheading.



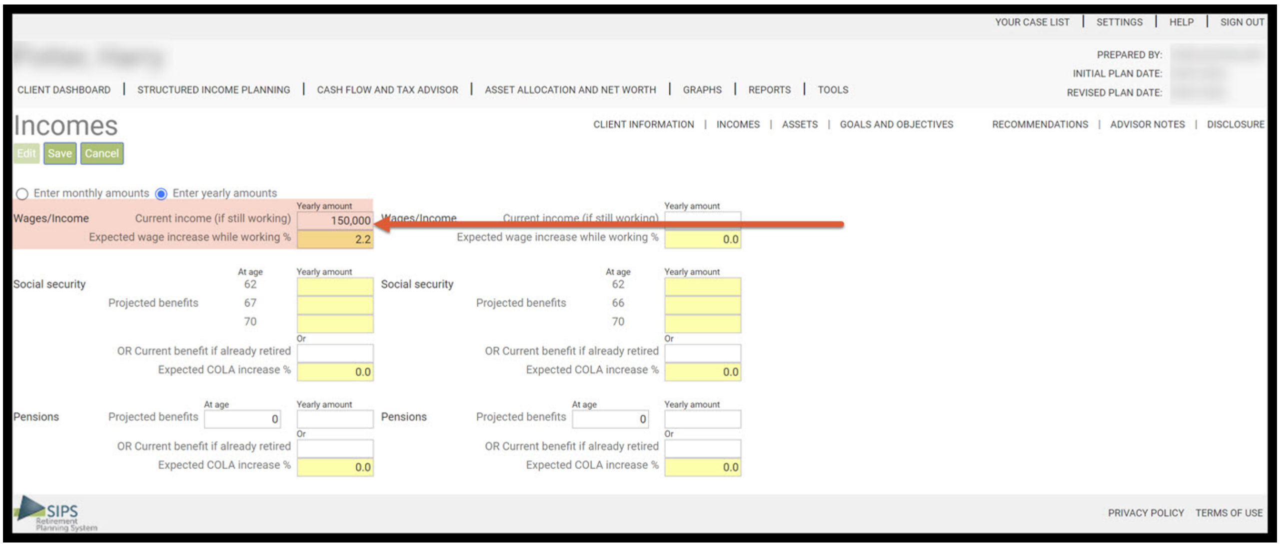
Step 8: Edit: Click on the green Edit button underneath the Incomes subheading.



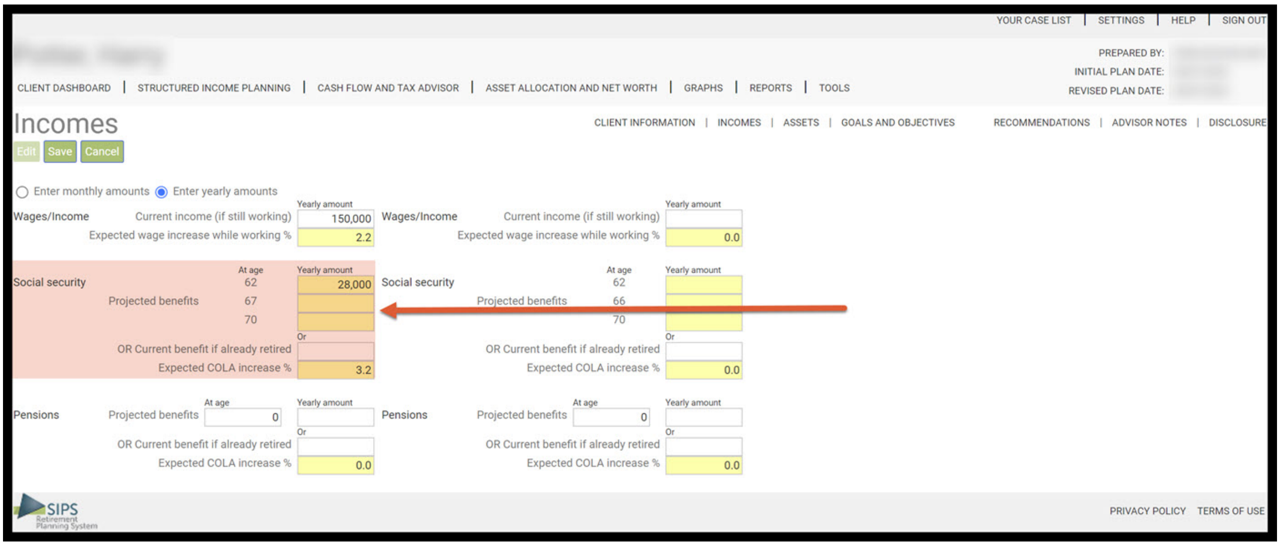
Step 9: Radio Button: Select which amounts you will be putting the monetary data in, yearly or monthly amount.



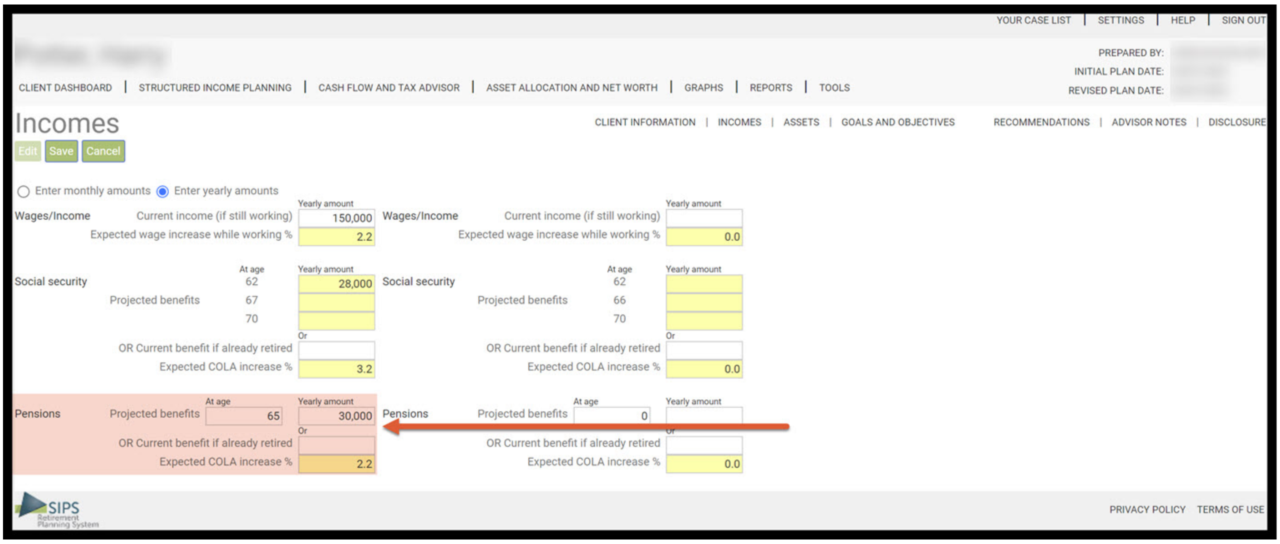
Step 10: Wages/Income: Enter in the data in the wages/income sections.



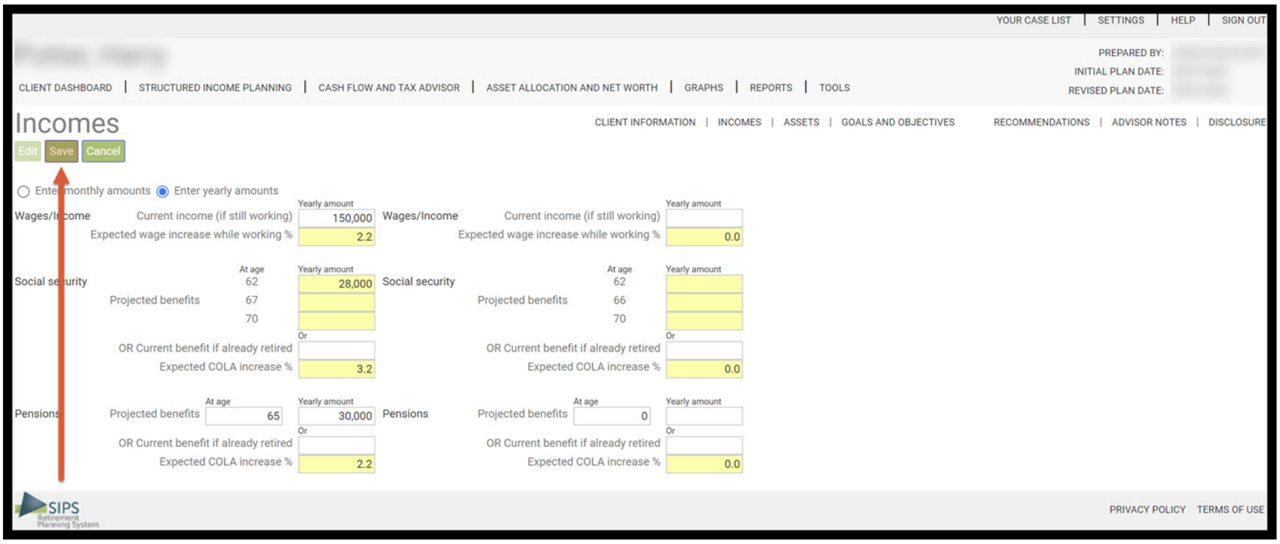
Step 11: Social Security: Enter in the data for the Social Security sections.



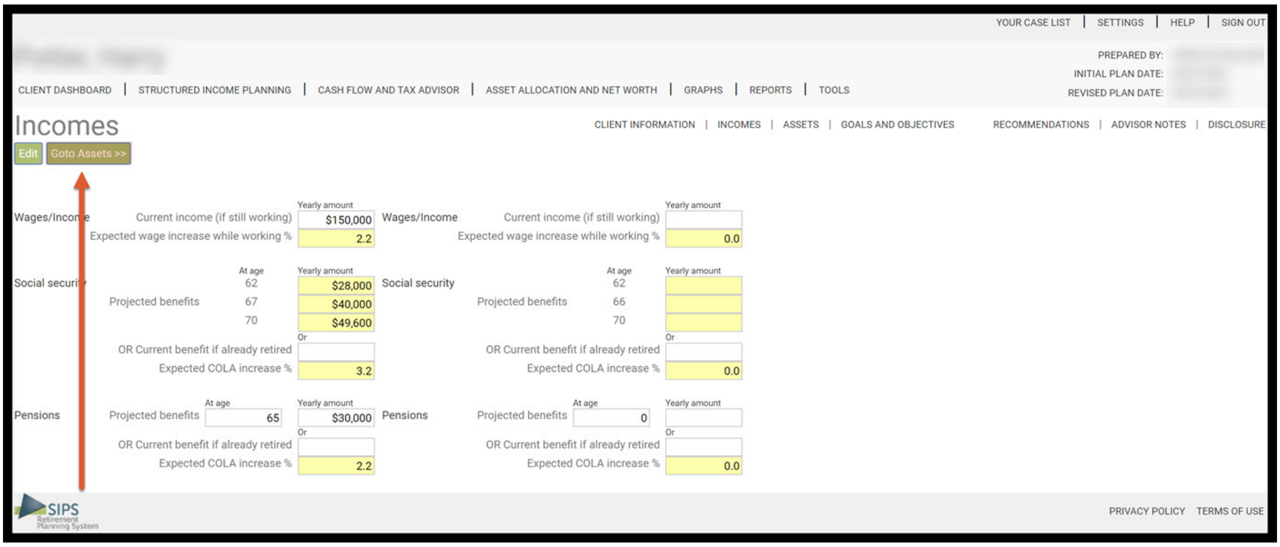
Step 12: Pensions: Enter in the data for pensions.



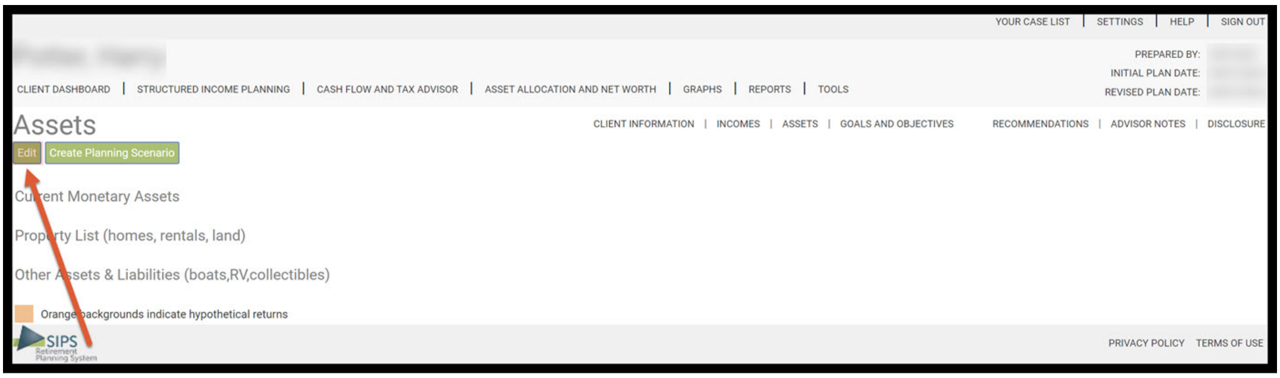
Step 13: Save: Click on the green Save button underneath the Incomes subheading.



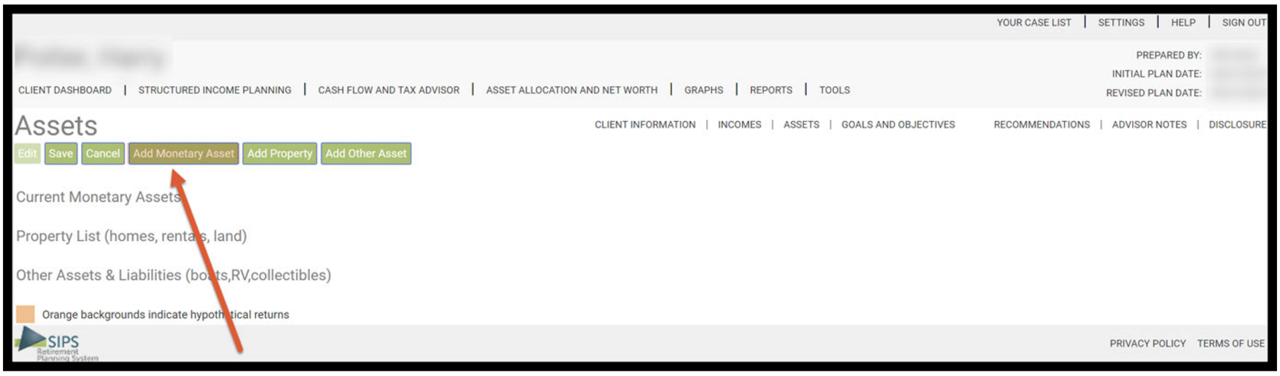
Step 14: Goto Assets: Click on the green GoTo Assets button underneath the Incomes subheading.



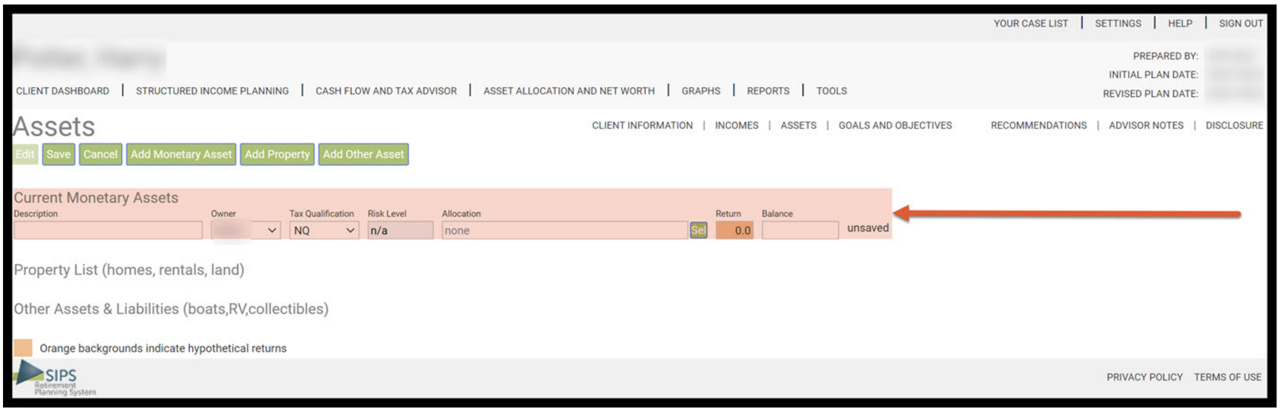
Step 15: Edit: Click on the green Edit button underneath the Assets subheading.



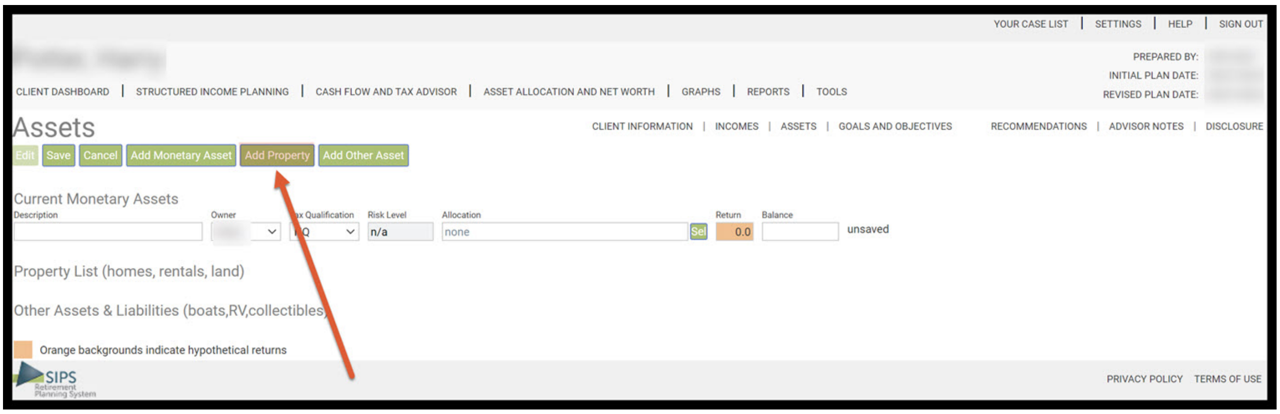
Step 16: Add Monetary Assets: Click on the green Add monetary Assets button underneath the Assets subheading.



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.



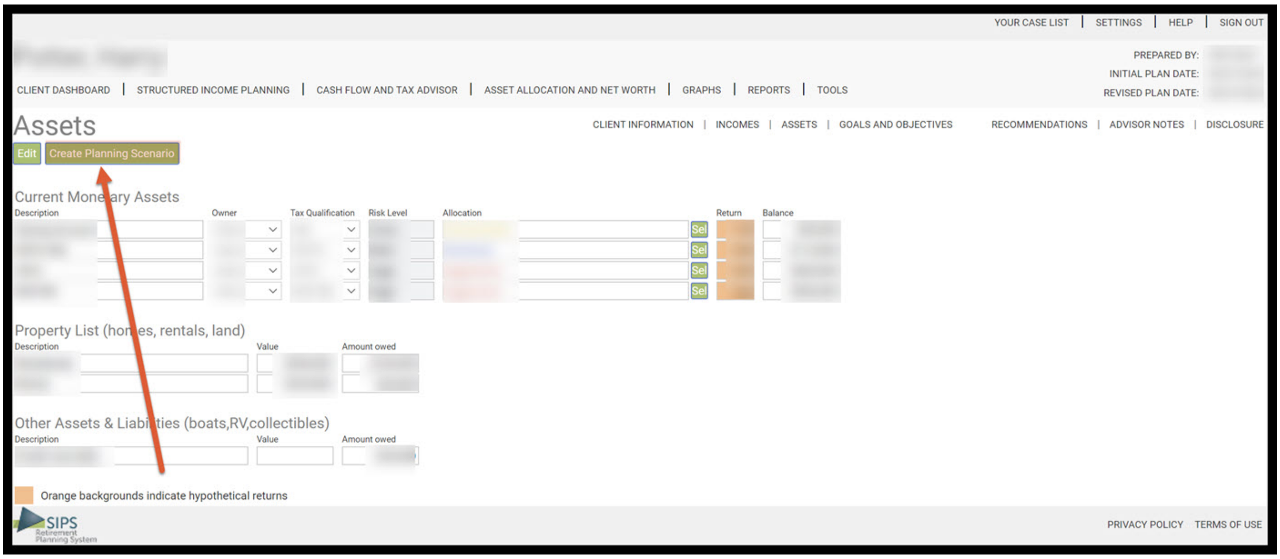
Step 19:Property List Description: Filter in the in data.

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

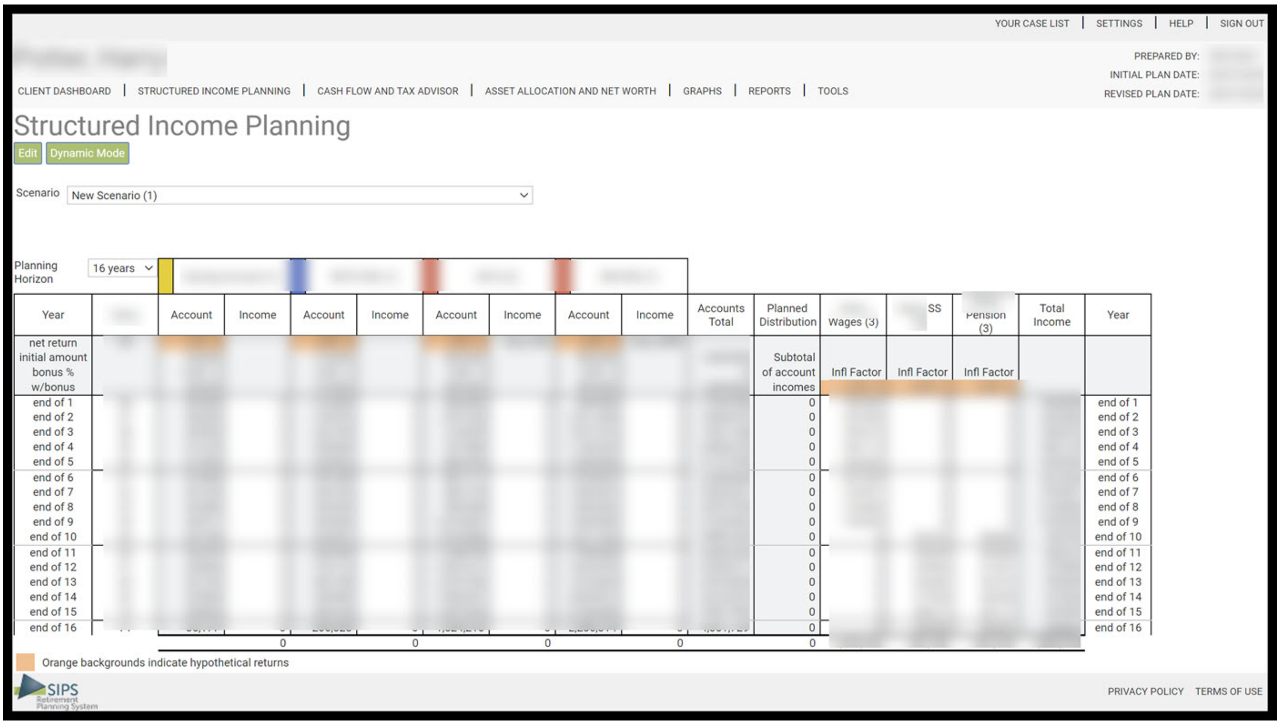
Step 21: Other Asset description: Filter in the data.

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

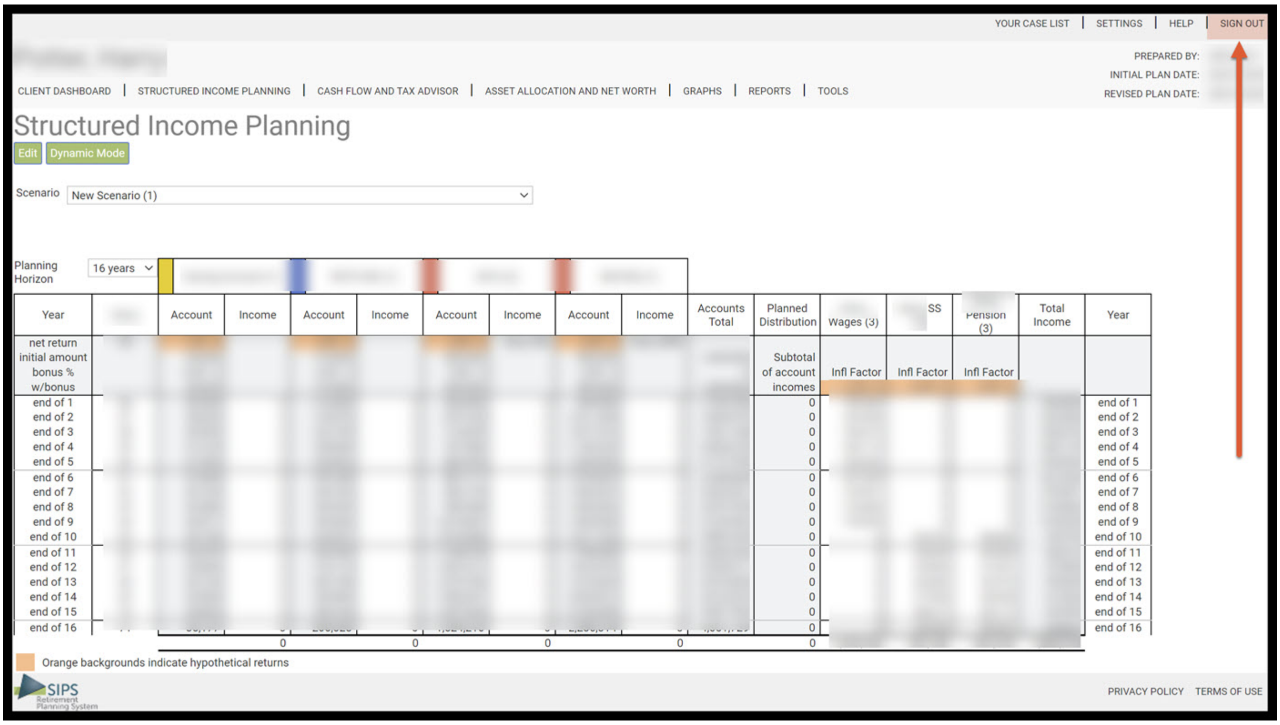
Step 23: Create Planning Scenario: Click on the green create planning scenario button underneath the Assets subheading.



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



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.



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.