# Adding a New Case

Below are the step-by-step guidelines for adding a basic new case into SIPS. Before entering a new case, ensure you have the necessary information, including the client's demographic details (name and age) and financial data (income and assets). Detailed instructions for each specific page can be found in the client dashboard section.

Step 1: Logging In: Log into SIPS.
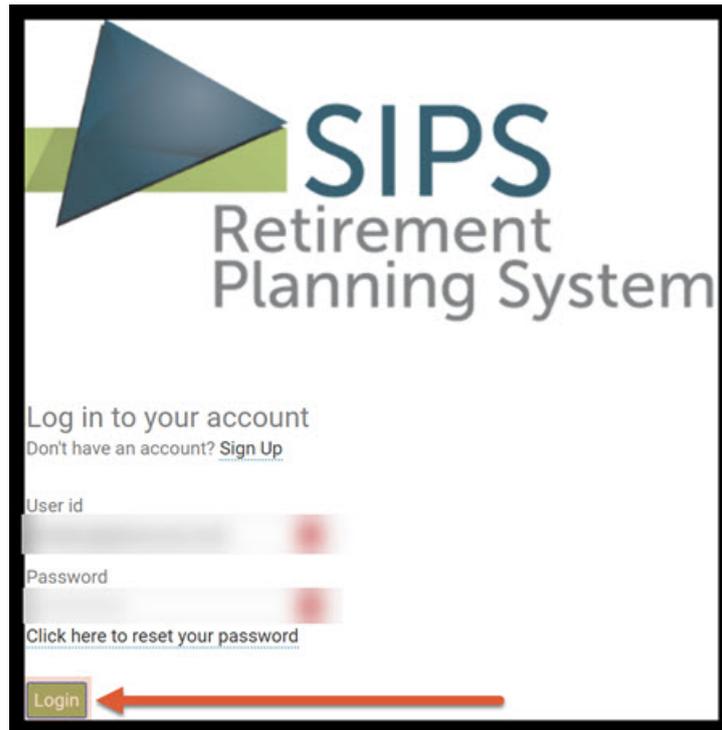
Step 2: Welcome Page: To navigate to the Your Case List screen, you have two options: click the green Go To Your Case List button under the Welcome heading, or select Your Case List in the upper-right corner. Both options lead to the same Your Case List page.
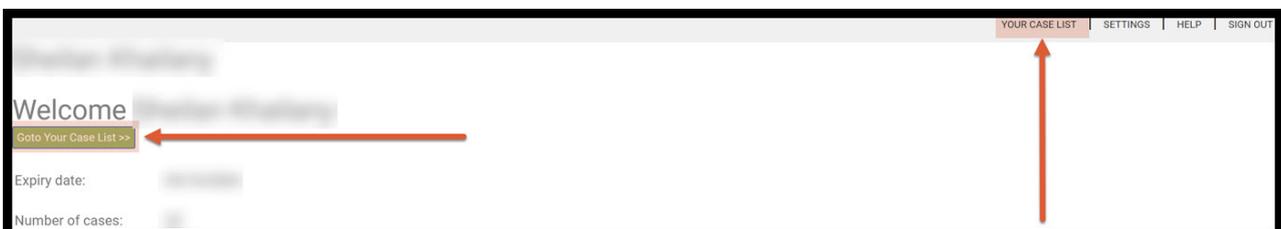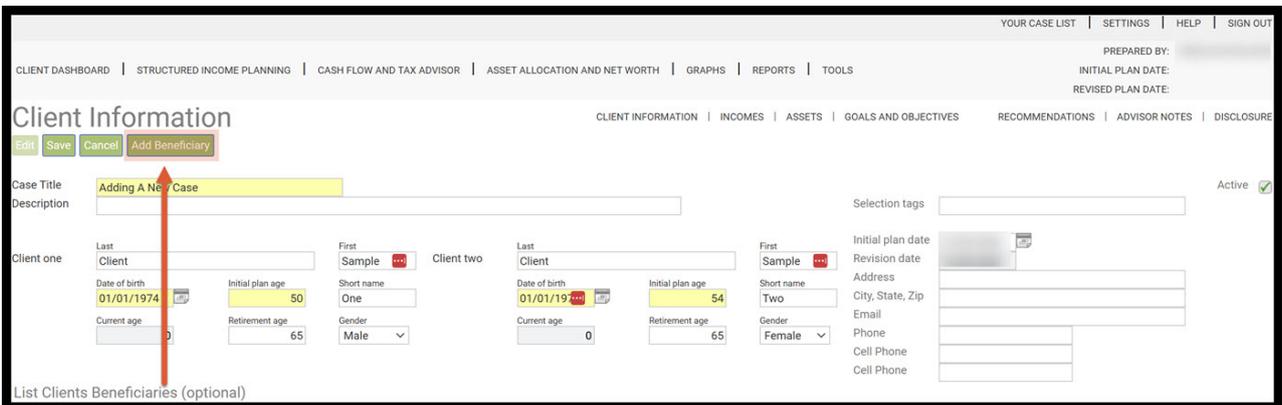

Step 3: Add Case: Click on the green Add Case button underneath the Your Case List subheading.
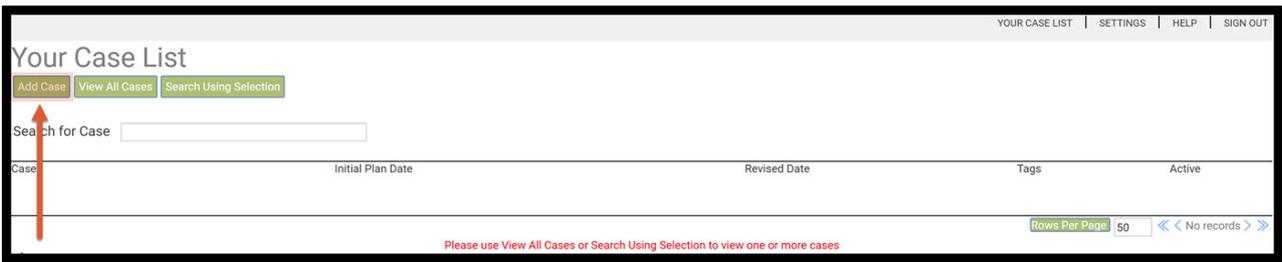
Step 4: Client Information Text Boxes: The yellow shaded text boxes are mandatory to fill out to move to the next step. Enter in the information for the text boxes.
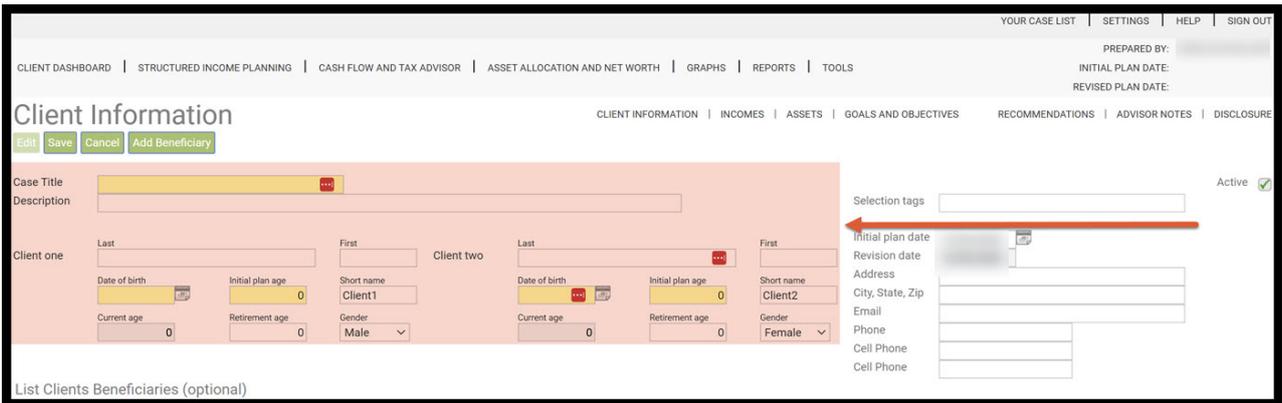
Step 5: Add Beneficiary: Click on the green Add Beneficiary button underneath the Client Information subheading if the client has beneficiaries.

Step 6: List Clients Beneficiaries (optional): Enter in the name of the beneficiaries.

Step 7: Save: Click on the green save button underneath the Client Information subheading.

Step 8: Goto Incomes: Click on the green GoTo Incomes underneath the Client Information subheading.

Step 9: Edit: Click on the green Edit button underneath the Incomes subheading.

Step 10: Amounts Radio Buttons: Select which amounts you will be using, the default is set at yearly amounts.

Step 11: Wages/Income: If your client is employed, enter their wage/income information. SIPS accepts commas and dollar symbols. The yellow-shaded text boxes are mandatory and must be completed to proceed to the next step. If your client is not employed, skip to the Social Security section.

Step 12: Social Security: For projected benefits, you can enter in one amount per age. If the client is already retired, input their benefit amounts. The yellow-shaded text boxes are mandatory and must be completed to proceed to the next step.

Step 13: Pensions: If your client will receive a pension, enter the relevant information. The yellow-shaded text boxes are mandatory and must be completed to proceed to the next step.

Step 14: Save: Click on the green Save button underneath the Incomes subheading.

Step 15: Goto Assets: Click on the green GoTo Assets button underneath the Incomes subheading.

Step 16: Edit: Click on the green Edit button underneath the Assets subheading.

Step 17: Add Monetary Assets: Click on the green Add monetary Assets button underneath the Assets subheading.

Step 18: Current Monetary Assets: Enter in the data.

Step 19: Add Monetary Asset: Repeat step 18 if your client has more than one monetary asset.

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

Step 21: Create Planning Scenario: Click on the green Create Planning Scenario button underneath the Assets subheading.

Adding A New Case

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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Assets

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

Edit   Create Planning Scenario

Current Monetary Assets

Description	Owner	Tax Qualification	Risk Level	Allocation		Return	Balance
Checking/Savings account	joint	NQ	Cons	Conservative	Sel	0.001	$25,000
Roth IRA	One	ROTH	Mod	Moderate	Sel	3.0	$500,000
401(k)	Two	401k	Aggr	Aggressive	Sel	6.0	$750,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats,RV,collectibles)

Orange backgrounds indicate hypothetical returns

Step 22: Structured Income Planning Page: The Structured Income Planning should reflect the editing changes made to the account.

Adding A New Case

PREPARED BY:
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Structured Income Planning

Edit   Dynamic Mode

Scenario   New Scenario (1)

Planning Horizon 16 years

Year	One	Two	Checking/Savings account (2) Account	Income	Roth IRA (2) Account	Income	401 (2) Account	Income	Accounts Total	Planned Distribution	One Wages (3)	One SS (3)	Two SS (3)	One Pension (3)	Total Income	Year
net return	50	54	0.00 %		3.00 %		6.00 %	Two IRA								
initial amount			25,000		500,000		750,000		1,275,000	Subtotal						
bonus %			0.00 %		0.00 %		0.00 %		0	of account	Infl Factor	Infl Factor	Infl Factor	Infl Factor		
w/bonus			25,000		500,000		750,000		1,275,000	incomes	2.00 %	2.50 %	2.50 %	1.50 %		
end of 1	51	55	25,000	0	515,000	0	795,000	0	1,335,000	0	100,000	0	0	0	100,000	end of 1
end of 2	52	56	25,000	0	530,450	0	842,700	0	1,398,150	0	102,000	0	0	0	102,000	end of 2
end of 3	53	57	25,001	0	546,364	0	893,262	0	1,464,626	0	104,040	0	0	0	104,040	end of 3
end of 4	54	58	25,001	0	562,754	0	946,858	0	1,534,613	0	106,121	0	0	0	106,121	end of 4
end of 5	55	59	25,001	0	579,637	0	1,003,669	0	1,608,307	0	108,243	0	0	0	108,243	end of 5
end of 6	56	60	25,002	0	597,026	0	1,063,889	0	1,685,916	0	110,408	0	0	0	110,408	end of 6
end of 7	57	61	25,002	0	614,937	0	1,127,722	0	1,767,661	0	112,616	0	0	0	112,616	end of 7
end of 8	58	62	25,002	0	633,385	0	1,195,386	0	1,853,772	0	114,869	0	0	0	114,869	end of 8
end of 9	59	63	25,002	0	652,386	0	1,267,108	0	1,944,497	0	117,166	0	0	0	117,166	end of 9
end of 10	60	64	25,002	0	671,958	0	1,343,135	0	2,040,095	0	119,509	0	0	0	119,509	end of 10
end of 11	61	65	25,003	0	692,117	0	1,423,723	0	2,140,842	0	121,899	0	15,054	0	136,953	end of 11
end of 12	62	66	25,003	0	712,880	0	1,509,146	0	2,247,029	0	124,337	0	15,430	0	139,768	end of 12
end of 13	63	67	25,003	0	734,267	0	1,599,695	0	2,358,964	0	126,824	0	15,816	0	142,640	end of 13
end of 14	64	68	25,004	0	756,295	0	1,695,676	0	2,476,974	0	129,361	0	16,212	0	145,572	end of 14
end of 15	65	69	25,004	0	778,983	0	1,797,417	0	2,601,404	0	0	27,097	16,617	48,000	91,714	end of 15
end of 16	66	70	25,004	0	802,353	0	1,905,262	0	2,732,618	0	0	27,774	17,032	48,720	93,527	end of 16
				0		0		0		0	1,597,394	54,871	96,161	96,720	1,845,146	

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Step 23: Log Out: To log out of SIPS click on the Sign Out heading that is located in the upper righthand side of the screen.

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Structured Income Planning

Edit | Dynamic Mode

Scenario New Scenario (1)

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initial amount			25,000		500,000		750,000		1,275,000	Subtotal	Infl Factor	Infl Factor	Infl Factor	Infl Factor		
bonus %			0.00 %		0.00 %		0.00 %		0	of account						
w/bonus			25,000		500,000		750,000		1,275,000	incomes	2.00 %	2.50 %	2.50 %	1.50 %		
end of 1	51	55	25,000	0	515,000	0	795,000	0	1,335,000	0	100,000	0	0	0	100,000	end of 1
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				0		0		0		0	1,597,394	54,871	96,161	96,720	1,845,146	

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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.