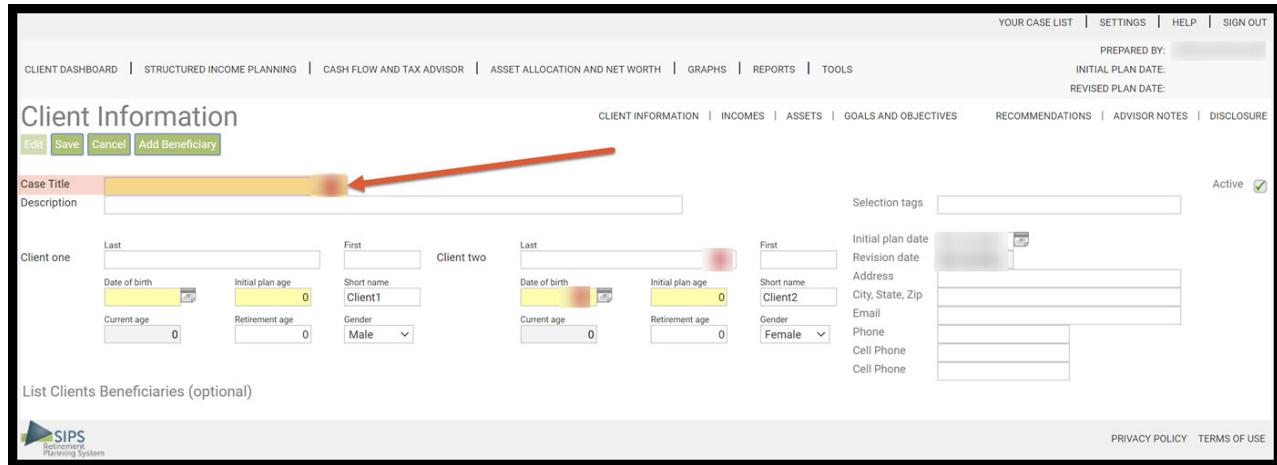


Client Information

01/09/2026 11:32 am EST

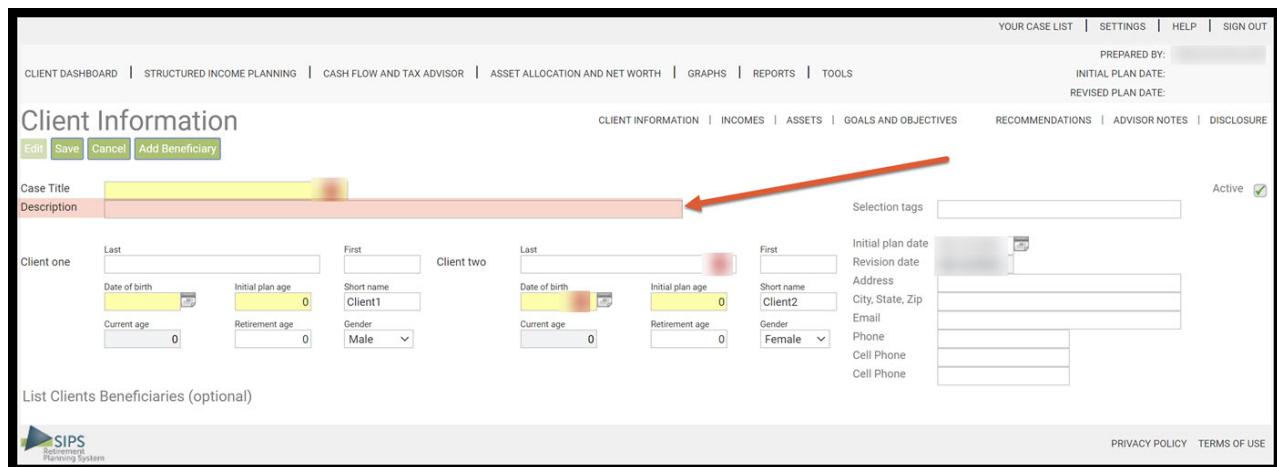
Below is a step-by-step guide to entering in the demographic information for the client information section of SIPS.

Step 1: Case Title: This text box is used for the naming system for the title of your case. Enter in what you would like your case title to be for the client. Once done, press the tab button to move to the next text box.



The screenshot shows the 'Client Information' page in SIPS. The 'Case Title' field is highlighted with a yellow background and a red arrow points to it. The page includes sections for 'Client one' and 'Client two' with various demographic fields like Last Name, First Name, Date of birth, and Initial plan age. On the right, there are 'Selection tags' and 'Active' checkboxes, and a sidebar with 'PREPARED BY:' and 'INITIAL PLAN DATE:' fields.

Step 2: Description: This text box correlates with what text you would like to have shown in report in the final steps. This text box is not mandatory to fill in when creating a case in SIPS. Once done, press the tab button to move to the next text box.



The screenshot shows the 'Client Information' page in SIPS. The 'Description' field is highlighted with a pink background and a red arrow points to it. The page includes sections for 'Client one' and 'Client two' with various demographic fields like Last Name, First Name, Date of birth, and Initial plan age. On the right, there are 'Selection tags' and 'Active' checkboxes, and a sidebar with 'PREPARED BY:' and 'INITIAL PLAN DATE:' fields.

Step 3: Selection Tags: This text box correlates with which person has ownership of the case in SIPS. When viewing all the cases under the Your Case List page, the selection tags title will show up. This text box is not mandatory to fill in when creating a case in SIPS. Enter in the naming system you would like to put in. Once done, press the tab button to move to the next text box.

Client Information

Case Title: [Redacted]
Description: [Redacted]

Client one: Last [Redacted], First [Redacted]. Client two: Last [Redacted], First [Redacted].

Date of birth: [Redacted] Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Male

Short name: Client1

Client one: Last [Redacted], First [Redacted]. Client two: Last [Redacted], First [Redacted].

Date of birth: [Redacted] Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Female

Short name: Client2

Selection tags: Initial plan date, Revision date, Address, City, State, Zip, Email, Phone, Cell Phone, Cell Phone

Active:

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 4: Initial Plan Date: This text box has the day's date automatically filtered in when you start to create a case. If you would like to edit the initial plan date you can click on the calendar icon next to the box and click on the date that you would like the initial plan date to reflect. The initial plan date is correlated with the clients age of birth. Each time there is an edit to this data it will change the clients yearly age and it will be reflected in the initial plan age for the client. Once done, press the tab button to move to the next text box.

Client Information

Case Title: [Redacted]
Description: [Redacted]

Client one: Last [Redacted], First [Redacted]. Client two: Last [Redacted], First [Redacted].

Date of birth: [Redacted] Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Male

Short name: Client1

Client one: Last [Redacted], First [Redacted]. Client two: Last [Redacted], First [Redacted].

Date of birth: [Redacted] Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Female

Short name: Client2

Selection tags: Initial plan date, Revision date, Address, City, State, Zip, Email, Phone, Cell Phone, Cell Phone

Active:

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

NOTE: The revision date is grayed out since this is data you cannot change. It will always reflect the day's date that a SIPS user has come in and edited a change to plan.

Client Information

Case Title: [Redacted]
Description: [Redacted]

Client one: Last [Redacted], First [Redacted]. Client two: Last [Redacted], First [Redacted].

Date of birth: [Redacted] Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Male

Short name: Client1

Client one: Last [Redacted], First [Redacted]. Client two: Last [Redacted], First [Redacted].

Date of birth: [Redacted] Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Female

Short name: Client2

Selection tags: Initial plan date, Revision date, Address, City, State, Zip, Email, Phone, Cell Phone, Cell Phone

Active:

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

PRIVACY POLICY TERMS OF USE

Step 5: Clients Name: Enter in the Clients last name and First name. If the Case has only one person use the Client One section to filter in their names. Once done, press the tab button to move to the next text box.

Client Information

Case Title: [redacted]
Description: [redacted]

Client one: Last [redacted], First [redacted]
Client two: Last [redacted], First [redacted]

Client one details:
Date of birth: [redacted], Initial plan age: 0
Current age: 0, Retirement age: 0
Gender: Male

Client two details:
Short name: Client1
Date of birth: [redacted], Initial plan age: 0
Current age: 0, Retirement age: 0
Gender: Male

Client two details:
Short name: Client2
Date of birth: [redacted], Initial plan age: 0
Current age: 0, Retirement age: 0
Gender: Female

Selection tags: Active [checkbox]
Initial plan date: [redacted]
Revision date: [redacted]
Address: [redacted]
City, State, Zip: [redacted]
Email: [redacted]
Phone: [redacted]
Cell Phone: [redacted]

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

Step 6: Address: If you have the client's address enter in this information. This information is not mandatory data for creating a structured income plan. Once done, press the tab button to move to the next text box.

Client Information

Case Title: [redacted]
Description: [redacted]

Client one: Last [redacted], First [redacted]
Client two: Last [redacted], First [redacted]

Client one details:
Date of birth: [redacted], Initial plan age: 0
Current age: 0, Retirement age: 0
Gender: Male

Client two details:
Short name: Client1
Date of birth: [redacted], Initial plan age: 0
Current age: 0, Retirement age: 0
Gender: Male

Client two details:
Short name: Client2
Date of birth: [redacted], Initial plan age: 0
Current age: 0, Retirement age: 0
Gender: Female

Selection tags: Active [checkbox]
Initial plan date: [redacted]
Revision date: [redacted]
Address: [redacted]
City, State, Zip: [redacted]
Email: [redacted]
Phone: [redacted]
Cell Phone: [redacted]

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

Step 7: Date of Birth, Initial Plan Age, and Current Age: Enter in the date of birth for the client. The format SIPS uses is: MM/DD/YYYY. If you do not have this you can enter in the client's age. If you do not have either of this information when looking at the structured income plan there will be no age under the client's information. If you know what year the client is born but not the exact month and date, you can put in the year and select January 01 and SIPS will do an estimation of the age. If you know the clients age but not the exact birth date, SIPS will do an estimation for the birth date. Once you put in the date of birth the current age box will be filtered in after you save the data. The only way to edit the current age is by editing the date of birth text box. Once done, press the tab button to move to the next text box.

Client Information

Case Title:

Description:

Client one: Last First Client two: Last First

Date of birth Initial plan age 0
 Current age 0 Retirement age 0
 Short name: Client1 Gender: Male

Date of birth Initial plan age 0
 Current age 0 Retirement age 0
 Short name: Client2 Gender: Female

Selection tags: Active

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

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

Step 8: Short Name: This text box is the name you would like the case to go by. The short name is also linked to the identification of the case. Once done, press the tab button to move to the next text box.

Client Information

Case Title:

Description:

Client one: Last First Client two: Last First

Date of birth Initial plan age 0
 Current age 0 Retirement age 0
 Short name: Client1 Gender: Male

Date of birth Initial plan age 0
 Current age 0 Retirement age 0
 Short name: Client2 Gender: Female

Selection tags: Active

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

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

Step 9: City, State, Zip: Enter in this demographic information. The only item that is the most important is the state. SIPS has features in the program that will factor out the state taxes of where the client lives. Once done, press the tab button to move to the next text box.

Client Information

Case Title:

Description:

Client one: Last First Client two: Last First

Date of birth Initial plan age 0
 Current age 0 Retirement age 0
 Short name: Client1 Gender: Male

Date of birth Initial plan age 0
 Current age 0 Retirement age 0
 Short name: Client2 Gender: Female

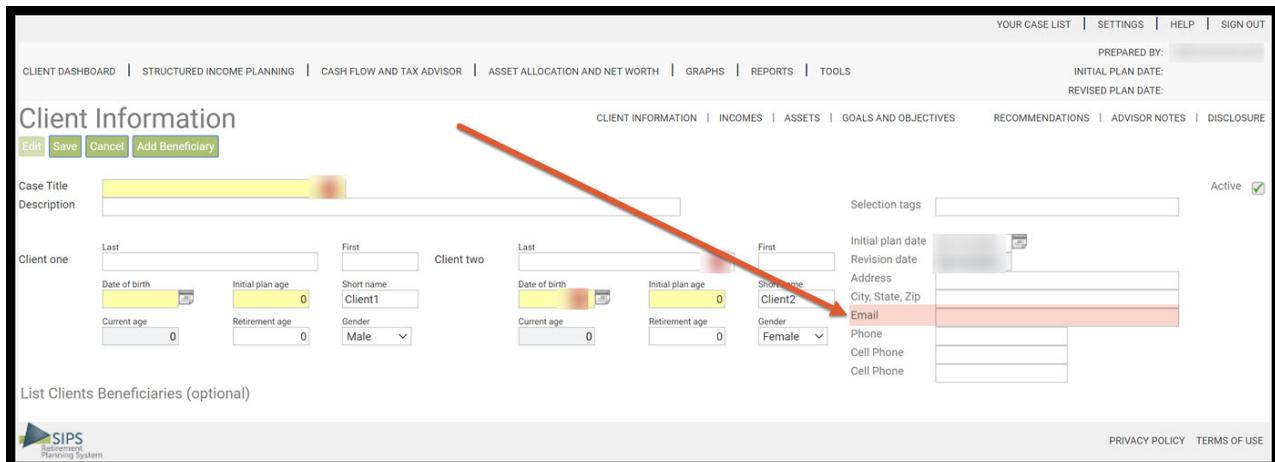
Selection tags: Active

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

List Clients Beneficiaries (optional)

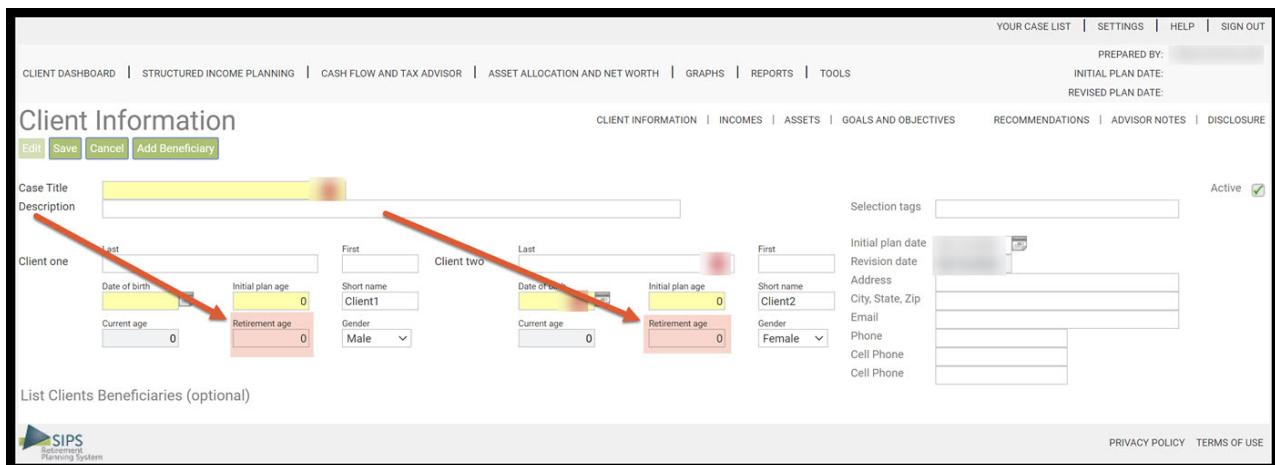
SIPS Retirement Planning System

Step 10: Email: Filter in the email information. This information is not mandatory for the structured income plan so it is optional for filing in. Once done, press the tab button to move to the next text box.



The screenshot shows the 'Client Information' page. At the top, there are tabs for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. Below the tabs, there are sections for 'Client one' and 'Client two'. The 'Email' field for Client two is highlighted with a red box and a red arrow pointing to it. Other fields include 'Initial plan date', 'Revision date', 'Address', 'City, State, Zip', 'Phone', 'Cell Phone', and 'Cell Phone'.

Step 11: Retirement Age: Filter in the desired retirement age. This text box is mandatory for filling in. This text box correlates in the structured income plan when the social security will start to be distributed. If a retirement age is not entered SIPS will not allow you to move to the Assets page for filtering in the data. Once done, press the tab button to move to the next box.



The screenshot shows the 'Client Information' page. The 'Retirement age' field for both 'Client one' and 'Client two' is highlighted with a red box and a red arrow pointing to it. Other fields include 'Initial plan age', 'Current age', 'Last', 'First', 'Short name', 'Gender', 'Initial plan date', 'Revision date', 'Address', 'City, State, Zip', 'Email', 'Phone', 'Cell Phone', and 'Cell Phone'.

Step 12: Gender: Using the down carrot arrow, select a gender for the client. As default, client one is selected as male and client two is selected as female. For tax purposes in SIPS it is best to claim a gender so that the tax estimations are correct. Once done, press the tab button to move to the next box.

Client Information

Case Title: Description: Active:

Client one: Last: First: Client two: Last: First:

Client one: Date of birth: Initial plan age: Client two: Date of birth: Initial plan age:

Client one: Current age: Retirement age: Client two: Current age: Retirement age:

Client one: Short name: Client1 Gender: Male Client two: Short name: Client2 Gender: Female

Selection tags: 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 13: Phone: This text box is not mandatory. Filter in the phone number or this text box can be left back. Once done, press the tab button to move to the next box.

Client Information

Case Title: Description: Active:

Client one: Last: First: Client two: Last: First:

Client one: Date of birth: Initial plan age: Client two: Date of birth: Initial plan age:

Client one: Current age: Retirement age: Client two: Current age: Retirement age:

Client one: Short name: Client1 Gender: Male Client two: Short name: Client2 Gender: Female

Selection tags: 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 14: Cell Phone: This text box is not mandatory. Filter in the cell phone number or this text box can be left back. Once done you can click on the add beneficiaries button if the client has beneficiaries.

Client Information

Case Title: Description: Active:

Client one: Last: First: Client two: Last: First:

Client one: Date of birth: Initial plan age: Client two: Date of birth: Initial plan age:

Client one: Current age: Retirement age: Client two: Current age: Retirement age:

Client one: Short name: Client1 Gender: Male Client two: Short name: Client2 Gender: Female

Selection tags: 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 15: Add Beneficiary: Filter in the clients beneficiary information. This step is optional.

Client Information

Case Title: Description: Active:

Client one: Last: First: Client two: Last: First:

Date of birth: Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Male

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)



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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

PRIVACY POLICY | TERMS OF USE

Step 16: Save: Once done, click on the Save button. This will save the information you have just entered and change the navigation buttons underneath the Client Information heading.

Client Information

Case Title: Description: Active:

Client one: Last: First: Client two: Last: First:

Date of birth: Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Male

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)



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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

PRIVACY POLICY | TERMS OF USE

Step 17: Edit: If you need to make corrections to the data, click on the green Edit button underneath the Client Information heading. Once done with the editing repeat step 16.

Client Information

Case Title: Description: Active:

Client one: Last: First: Client two: Last: First:

Date of birth: Initial plan age: 0
Current age: 0 Retirement age: 0 Gender: Male

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:



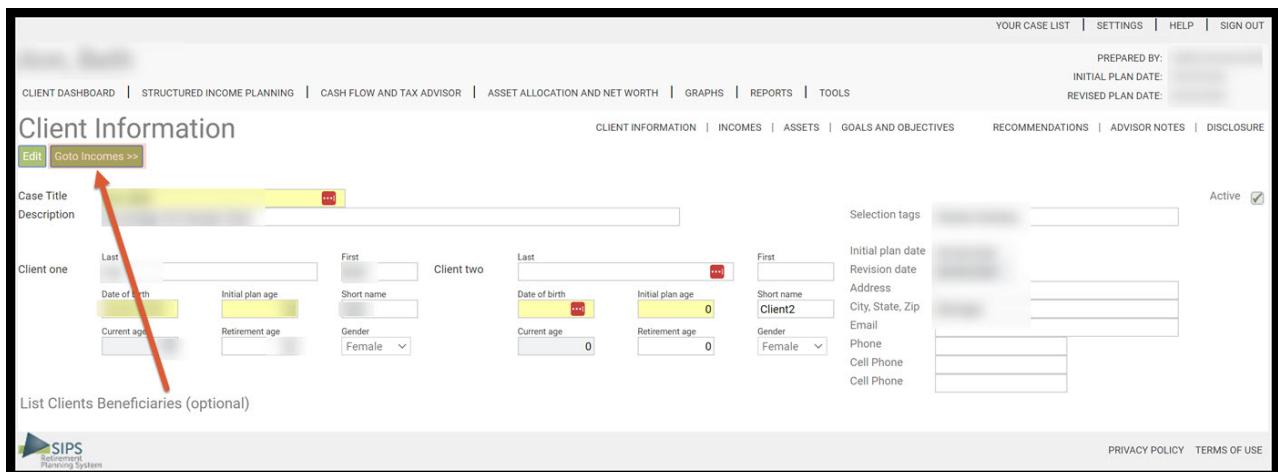
CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

PRIVACY POLICY | TERMS OF USE

Step 18: GoTo Incomes: Click on the GoTo Incomes button to take you to the Incomes page.



The screenshot shows the 'Client Information' page of the SIPS Retirement System. At the top, there are navigation links for 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are links for 'PREPARED BY', 'INITIAL PLAN DATE', and 'REVISED PLAN DATE'. Below the header, there are sections for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The main area is titled 'Client Information' and contains fields for 'Case Title' (with a red arrow pointing to the 'GoTo Incomes >>' button), 'Description', 'Client one' (with fields for Last, First, Date of birth, Initial plan age, Current age, Retirement age, and Gender), 'Client two' (with fields for Last, First, Date of birth, Initial plan age, Current age, Retirement age, and Gender), 'Selection tags' (with a checked 'Active' checkbox), and 'List Clients Beneficiaries (optional)'. The SIPS logo is at the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' links are at the bottom right.

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

