

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' form in the SIPS system. The 'Case Title' field is highlighted with a yellow background and a red arrow pointing to it. The 'Description' field is below it. To the right, there are fields for 'Selection tags' and 'Active' (checked). Below these are fields for 'Client one' and 'Client two', each with sub-fields for 'Last', 'First', 'Date of birth', 'Initial plan age', 'Current age', 'Retirement age', 'Short name', and 'Gender'. The 'Short name' fields are pre-filled with 'Client1' and 'Client2'. The 'Gender' fields are set to 'Male' and 'Female'. On the far right, there are fields for 'Initial plan date', 'Revision date', 'Address', 'City, State, Zip', 'Email', 'Phone', 'Cell Phone', and 'Cell Phone'. At the bottom left is the SIPS logo and 'Retirement Planning System'. At the bottom right are links for 'PRIVACY POLICY' and 'TERMS OF USE'.

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.

This screenshot is identical to the one above, but the 'Description' field is now highlighted with a yellow background and a red arrow pointing to it. The 'Case Title' field is no longer highlighted.

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.

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 Client two Last First

Date of birth Initial plan age Short name Date of birth Initial plan age Short name

Current age Retirement age Gender Current age Retirement age Gender

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 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 the 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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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PREPARED BY:
 INITIAL PLAN DATE:
 REVISED PLAN DATE:

Client Information

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

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Case Title
 Description

Selection tags Active ☒

Client one

Last First Client two Last First

Date of birth Initial plan age Short name Date of birth Initial plan age Short name

Current age Retirement age Gender Current age Retirement age Gender

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

List Clients Beneficiaries (optional)

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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 an edited a change to plan.

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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 Client two Last First

Date of birth Initial plan age Short name Date of birth Initial plan age Short name

Current age Retirement age Gender Current age Retirement age Gender

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

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

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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.

The screenshot shows the 'Client Information' form in the SIPS Retirement Planning System. The 'Client one' section is highlighted with a red border. It contains fields for Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name, and Gender. An orange arrow points to the 'First' field for Client one. The 'Client two' section is also visible but not highlighted. The 'Address' section is on the right side of the form.

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.

The screenshot shows the 'Client Information' form in the SIPS Retirement Planning System. The 'Address' section is highlighted with a red border. It contains fields for Address, City, State, Zip, Email, Phone, and Cell Phone. An orange arrow points to the 'Address' field. The 'Client one' and 'Client two' sections are visible on the left side of the form.

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.

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

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Case Title
 Description

Selection tags Active ☒

Client one

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Gender

Client two

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Gender

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

List Clients Beneficiaries (optional)

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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.

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PREPARED BY:
 INITIAL PLAN DATE:
 REVISED PLAN DATE:

Client Information

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

Case Title
 Description

Selection tags Active ☒

Client one

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Gender

Client two

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Gender

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

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

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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.

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PREPARED BY:
 INITIAL PLAN DATE:
 REVISED PLAN DATE:

Client Information

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

Case Title
 Description

Selection tags Active ☒

Client one

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Gender

Client two

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Gender

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

List Clients Beneficiaries (optional)

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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' form in the SIPS Retirement Planning System. The form has a navigation bar at the top with links like 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. Below the navigation bar, there are tabs for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The 'CLIENT INFORMATION' tab is active. The form contains fields for 'Case Title', 'Description', 'Client one', and 'Client two'. The 'Client one' section has fields for 'Last', 'First', 'Date of birth', 'Initial plan age', 'Current age', 'Retirement age', 'Short name', 'Gender', and 'Phone'. The 'Client two' section has similar fields. A red arrow points to the 'Email' field in the 'Client two' section. The 'Email' field is highlighted in red. The 'Phone' field is also highlighted in red. The 'Initial plan age' and 'Retirement age' fields are highlighted in yellow. The 'Current age' field is highlighted in grey. The 'Short name' field is highlighted in white. The 'Gender' field is a dropdown menu with 'Male' selected for Client one and 'Female' selected for Client two. The 'Phone' field is a text box with 'Cell Phone' and 'Cell Phone' labels. The 'Email' field is a text box with 'Email' label. The 'Initial plan date' and 'Revision date' fields are highlighted in grey. The 'Address' field is highlighted in white. The 'City, State, Zip' field is highlighted in white. The 'Selection tags' field is highlighted in white. The 'Active' checkbox is checked. The SIPS logo is in the bottom left corner. The 'PRIVACY POLICY' and 'TERMS OF USE' links are in the bottom right corner.

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' form in the SIPS Retirement Planning System. The form has a navigation bar at the top with links like 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. Below the navigation bar, there are tabs for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The 'CLIENT INFORMATION' tab is active. The form contains fields for 'Case Title', 'Description', 'Client one', and 'Client two'. The 'Client one' section has fields for 'Last', 'First', 'Date of birth', 'Initial plan age', 'Current age', 'Retirement age', 'Short name', 'Gender', and 'Phone'. The 'Client two' section has similar fields. Red arrows point to the 'Retirement age' fields for both Client one and Client two. The 'Retirement age' field is highlighted in red. The 'Initial plan age' and 'Current age' fields are highlighted in yellow. The 'Short name' field is highlighted in white. The 'Gender' field is a dropdown menu with 'Male' selected for Client one and 'Female' selected for Client two. The 'Phone' field is a text box with 'Cell Phone' and 'Cell Phone' labels. The 'Email' field is a text box with 'Email' label. The 'Initial plan date' and 'Revision date' fields are highlighted in grey. The 'Address' field is highlighted in white. The 'City, State, Zip' field is highlighted in white. The 'Selection tags' field is highlighted in white. The 'Active' checkbox is checked. The SIPS logo is in the bottom left corner. The 'PRIVACY POLICY' and 'TERMS OF USE' links are in the bottom right corner.

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.

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
 Date of birth Initial plan age Client1
 Current age Retirement age Gender

Client two

Last First Short name
 Date of birth Initial plan age Client2
 Current age Retirement age Gender

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

List Clients Beneficiaries (optional)

SIPS Retirement Planning System

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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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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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
 Date of birth Initial plan age Client1
 Current age Retirement age Gender

Client two

Last First Short name
 Date of birth Initial plan age Client2
 Current age Retirement age Gender

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

List Clients Beneficiaries (optional)

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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.

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
 Date of birth Initial plan age Client1
 Current age Retirement age Gender

Client two

Last First Short name
 Date of birth Initial plan age Client2
 Current age Retirement age Gender

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

List Clients Beneficiaries (optional)

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

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

Client two

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Client2
 Gender
 Female

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

List Clients Beneficiaries (optional)

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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.

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

Client two

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Client2
 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

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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.

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](#) [Goto Incomes >>](#)

Case Title
 Description

Selection tags
 Active ☒

Client one

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Client1
 Gender
 Male

Client two

Last
 First
 Date of birth
 Initial plan age
 Current age
 Retirement age
 Short name
 Client2
 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

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

The screenshot shows the 'Client Information' page in the SIPS Retirement Planning System. The page has a top navigation bar with links: YOUR CASE LIST, SETTINGS, HELP, and SIGN OUT. Below this is a secondary navigation bar with links: CLIENT DASHBOARD, STRUCTURED INCOME PLANNING, CASH FLOW AND TAX ADVISOR, ASSET ALLOCATION AND NET WORTH, GRAPHS, REPORTS, and TOOLS. The main header area includes 'Client Information' and a sub-header with links: CLIENT INFORMATION, INCOMES, ASSETS, GOALS AND OBJECTIVES, RECOMMENDATIONS, ADVISOR NOTES, and DISCLOSURE. On the right, there are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main content area is titled 'Client Information' and contains several sections. At the top left, there are two buttons: 'Edit' and 'GoTo Incomes >>'. A red arrow points to the 'GoTo Incomes >>' button. Below these buttons are fields for 'Case Title' and 'Description'. To the right of these fields is a 'Selection tags' section with a dropdown menu and an 'Active' checkbox. Below the 'Case Title' and 'Description' fields are two columns for 'Client one' and 'Client two'. Each column has fields for 'Last', 'First', 'Date of birth', 'Initial plan age', 'Current age', 'Retirement age', and 'Gender'. The 'Client two' section also has a 'Short name' field. To the right of the client information fields is a 'List Clients Beneficiaries (optional)' section. At the bottom left, there is a logo for 'SIPS Retirement Planning System'. At the bottom right, there are links for 'PRIVACY POLICY' and '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: support@planscout.com

