Recommendations

12/20/2024 1:47 pm EST

In the final report, which can be printed as a PDF, there is a page titled Summary of Recommendations. This page is linked to the Recommendations section within SIPS. On this page, you can select prewritten text and write unique text in as recommendations for your client. Below is a step-by-step guide on how to select prewritten text and write unique text for the Summary of Recommendations page in the final report.

Step 1: Logging In: Log into SIPS.



Step 2: Go To Your Case List: You can do this either by clicking the green 'Go To Your Case List' button or by selecting the 'Your Case List' subheading located in the upper-right corner of your screen.

	YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Ehalian History	1			
Goto Your Case List >>				
Expiry date:				
Number of cases:				

Step 3: View All Cases: Click on the Green View All Cases button underneath the Your Case List Heading located on the lefthand side of your screen.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
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Search for Case					
Case	Initial Plan Date	Revised Date	Tags	Active	
		Please use View All Cases or Search Using Selection to view one or more cases	Rows Per P	age 50 《 < No re	ecords > ≫

Step 4: Selection: Select which case you would like to work in by clicking on the case.

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Add Case View All Cases Search Using Selection Search for Case				
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Step 5: Recommendations: Click on the Recommendations subheading that is located on the right-hand side of the screen.

							YOUR CASE LIST	SETTINGS HEL	P SIGN OUT
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Step 6: Edit: Click on the green Edit button underneath the Recommendations for Client's Name 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:
Recommendations for	CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJECTIVES	RECOMMENDATIONS ADVISOR NOTES DISCLOSURE
Title Description		

Step 7: Down Carrot Arrow: Click on the down carrot arrow in the description text box and select which prewritten text you would like to use.

		YOUR CASE LIST SETTING HELP SIGN OUT
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		INITIAL PLAN I ATE:
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Edit Save Cancel Add Recommendation		
Title D	rescription	
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Step 8: Add Recommendation: Click on the green Add Recommendation button underneath the Recommendations for Client Name subheading.

			YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
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Recommendation		CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJECTIVES	RECOMMENDATIONS	ADVISOR N	NOTES	DISCLOSURE
Title	Description					
	Leg 1 - A managed conservative account is a great way to	schedule income for the first leg of an income plan. It provides liquidity and some growth op	portunity.	~		

Step 9: Add Recommendation: Repeat step 7 and 8 to add more prewritten texts to the report.

		YOUR CASE LIST SETTINGS HEL	LP SIGN OL
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Leg 2	An income rider is a feature that many annuities have available. These riders typically generate a significant, guaranteed increase in the income Accoun accumulation phase, continues to increase regardless of the base policy performance. We can take advantage of that and let this investment grow for can use this large accumulation to aclutate an income stream. This guaranteed income payment will never run out regardless of how long you live.		Del
Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year period, the rates we can expect will and in general we can make use of the benefits long term investing provides. After ten years, this account will be liquidated over a five year period to pr		unsaved
	Leg 3 - This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year period, the rates we can exp	pect will increase, bonuses will br \sim	

Step 10: Adding Unique Text: Click on the green Add Recommendation button underenath the Recommendations for Client Name subheading.

	YOUR CASE LIST SETTINGS	HELP SIGN 0
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Leg 2	An income rider is a feature that many annuities have available. These riders typically generate a significant, guaranteed increase in the Income Account Value, which during the accumulation phase, continues to increase regardless of the base policy performance. We can take advantage of that and let this investment grow for several years at which point we can use this large accumulation to calculate an income stream. This guaranteed income payment will never un out regardless of how long you live.	Del
Leg 2	accumulation phase, continues to increase regardless of the base policy performance. We can take advantage of that and let this investment grow for several years at which point we	Del

Step 11: Description TextBox: Click in the description text box and write in your unique text.

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Leg 3		This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year period, the rates we can ex and in general we can make use of the benefits long term investing provides. After ten years, this account will be liquidated over a five year per		Del
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Step 12: Title TextBox: Click in the title text box and write in your unique title.

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Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year period, the rates we can expect will and in general we can make use of the benefits long term investing provides. After ten years, this account will be liquidated over a five year period to pr		Del
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Step 13: Save: Click on the green Save button underneath the Recommendations for Clients Name subheading.

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Step 14: Edit: Click on the green Edit button underneath the Recommendations for Client's Name heading.

			YOUR CASE LIST SETTINGS HELP SIGN OUT
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1	Title	Description	
•	Leg 1	A managed conservative account is a great way to schedule income for the first leg of an income plan. It provides opportunity.	liquidity and some growth
•	Leg 2	An income rider is a feature that many annuities have available. These riders typically generate a significant, guara Income Account Value, which during the accumulation phase, continues to increase regardless of the base policy advantage of that and let this investment grow for several years at which point we can use this large accumulation stream. This guaranteed income payment will never run out regardless of how long you live.	performance. We can take
•	Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten yea expect will increase, bonuses will be bigger, and in general we can make use of the benefits long term investing pr account will be liquidated over a five year period to provide income in this timeframe.	
	Unique Title	This is the description text box where you can write in your unique text for recommendations to appear on the rect the final pdf report.	ommendations page and in

Step 15: Ordering the Recommendations: Use the up and down carrot arrows located on the left hand side of the screen to re-arrang the order of recommendations.

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Step 16: Deletion: Click on the green Del button to delete a description.

		YOUR CASE LIST SETTINGS	HELP SIGN OUT
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Step 17: Click OK: Click OK to the text message box that comes up from www.sipsplanning .net says, "Are you sure you would like to permanently delete this recommendation?

		www.sipsplanning.net says	YOUR CASE LIST SETTINGS	HELP SIGN OUT
Courses Service		Are you sure you would like to permanently delete this recommendation?	PREPARED	
CLIENT DASHBOARD STRUCTURED INCO	ME PLANNING CASH FLOW AND TAX ADVI	recommendation?	INITIAL PLAN D REVISED PLAN D	
Recommendation		OK Cancel	LS AND OBJECTIVES RECOMMENDATIONS ADVISO	OR NOTES DISCLOSURE
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Title	Description			
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Leg 3		s. When we promise to keep our money with an institution for a ten year period, the fits long term investing provides. After ten years, this account will be liquidated over		Del

Step 18: Save: Click on the green Save button underneath the Recommendations for Clients Name subheading.

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Le I	A managed conservative account is a great way to schedule income for the first leg of an income plan, it provides inquidity and some growth opportunity	. //	Der
Le 2	An income rider is a feature that many annulties have available. These riders typically generate a significant, guaranteed increase in the Income Account accumulation phase, continues to increase regardless of the base policy performance. We can take advantage of that and let this investment grow for sr can use this large accumulation to calculate an income stream. This guaranteed income payment will never run out regardless of how long you live.		Del
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Step 19: Clicking: The finalized version of the description and text will be displayed.

		YOUR CASE LIST SETTINGS HELP SIG	N OUT
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•	Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year period, the rates we can expect will increase, bonuses will be bigger, and in general we can make use of the benefits long term investing provides. After ten years, this account will be liquidated over a five year period to provide income in this timeframe.	

Step 20: Edit: If you need to make an edit to the Recommedantioons for client name click on the green edit button underneath the Recommendaitons for client name subheading.

			YOUR CASE LIST SETTINGS HELP SIGN OUT
СІ	JENT DASHBOARD STRUCTURED INC	OME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS	PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:
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	Leg 2	An income rider is a feature that many annuities have available. These riders typically generate a significant, guara Income Account Value, which during the accumulation phase, continues to increase regardless of the base policy advantage of that and let this investment grow for several years at which point we can use this large accumulation stream. This guaranteed income payment will never run out regardless of how long you live.	performance. We can take
·	Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year expect will increase, bonuses will be bigger, and in general we can make use of the benefits long term investing pro- account will be liquidated over a five year period to provide income in this timeframe.	

Step 21: Cancel: To go back to the previous page, click on the green Cancel button underneath the Recommendations for Client Name subheading.

		YOUR CASE LIST SETTINGS HE	LP SIGN OUT
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Leg 1	A managed conservative account is a great way to schedule income for the first leg of an income plan. It provides liquidity and some growth opportuni	ity.	Del
a ♣ Leg 2	An income rider is a feature that many annuities have available. These riders typically generate a significant, guaranteed increase in the Income Accoun accumulation phase, continues to increase regardless of the base policy performance. We can take advantage of that and let this investment grow for can use this large accumulation to calculate an income stream. This guaranteed income payment will never nun out regardless of how long you live.		Del
Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten year period, the rates we can expect will and in general we can make use of the benefits long term investing provides. After ten years, this account will be liquidated over a five year period to pr		Del

Step 22: Reports: Click on the Reports subheading located in the middle of the screen.

			YOUR CASE LIST SETTINGS HELP SIGN OUT
CL	IENT DASHBOARD STRUCTURED INC	OME PLANNING CASH FLOW AND TAX ADVISOR ASSET ALLOCATION AND NET WORTH GRAPHS REPORTS TOOLS	PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:
R	ecommendation ®	CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJECTIVES	RECOMMENDATIONS ADVISOR NOTES DISCLOSURE
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•	Leg 2	An income rider is a feature that many annuities have available. These riders typic IIIy generate a significant, guara Income Account Value, which during the accumulation phase, continues to increase regardless of the base policy advantage of that and let this investment grow for several years at which point we can use this large accumulation stream. This guaranteed income payment will never run out regardless of how long you live.	performance. We can take
•	Leg 3	This investment needs to grow for ten years. When we promise to keep our money with an institution for a ten yea expect will increase, bonuses will be bigger, and in general we can make use of the benefits long term investing praccount will be liquidated over a five year period to provide income in this timeframe.	

Step 23: Summary of Recommendations Checkbox: Click on the Summary of Recommendations Checkbox.

			YOUR CASE LIST SETTINGS	HELP SIGN OUT
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Reports Generate Report				
	Select Pages To Include			
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	Client Details			
	Cash Flow and Income Taxes			
	Asset Allocation and Net Worth			
	Structured Income Plan	Use 2 page income plan		
	Structured Income Plan Graph			
	Summary of Recommendations			
	Goals			
	Notes			
	Use Legal Size Paper			
Name]	

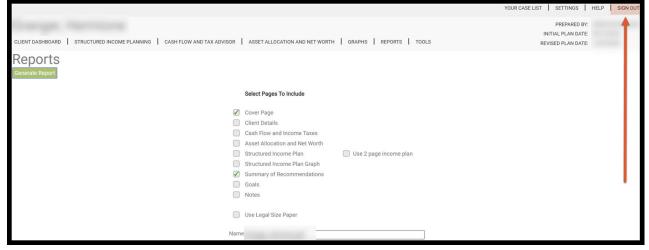
Step 24: Generate Report: Click on the green Generate Report button underneath the Reports subheading.

			YOUR CASE LIST SETTINGS	HELP SIGN OUT
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CLIENT DASHBOARD STRUCTURED INCOME PLANNING CASH FLOW AND TAX ADVISOR	ASSET ALLOCATION AND NET WORTH	GRAPHS REPORTS TOO	LS REVISED PLAN DATE	
Reports				
Generate Report				
1	Select Pages To Include			
⊘	Cover Page			
	Client Details			
	Cash Flow and Income Taxes			
	Asset Allocation and Net Worth			
		Use 2 page income plan		
	Structured Income Plan Graph			
	Summary of Recommendations			
-	Goals			
	Notes			
0	Use Legal Size Paper			
Name				

Step 25: Download: Open the pdf document that has been downloaded.

C sipsplanning.net/recommendations.do?action=reports		Q 🕁 🗗	£ ₹
		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:	
Reports Generate Report			
	Select Pages To Include		
	Cover Page Cilent Details Cash Flow and Income Taxes Asset Allocation and Net Worth Structured Income Plan Graph Summary of Recommendations Goals Notes		
Nami	Use Legal Size Paper		

Step 26: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand 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.