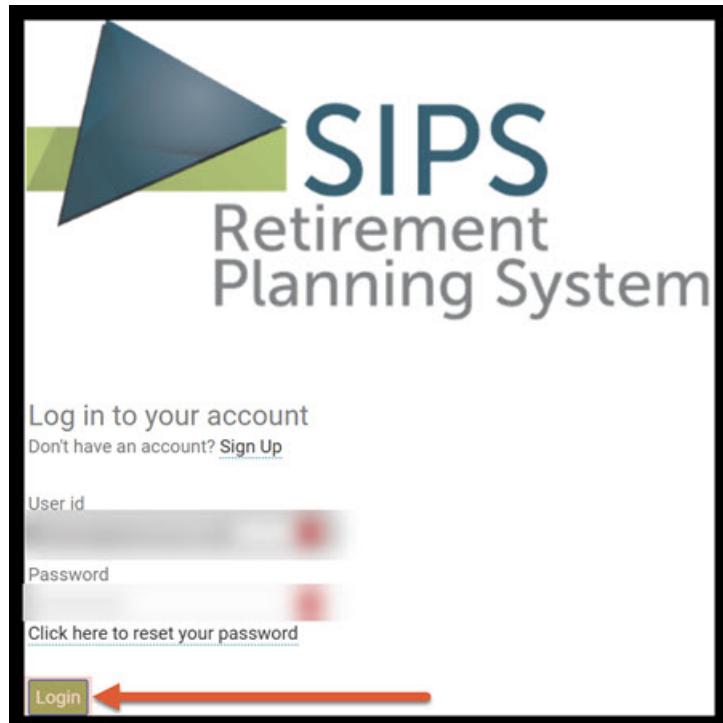


Recommendations

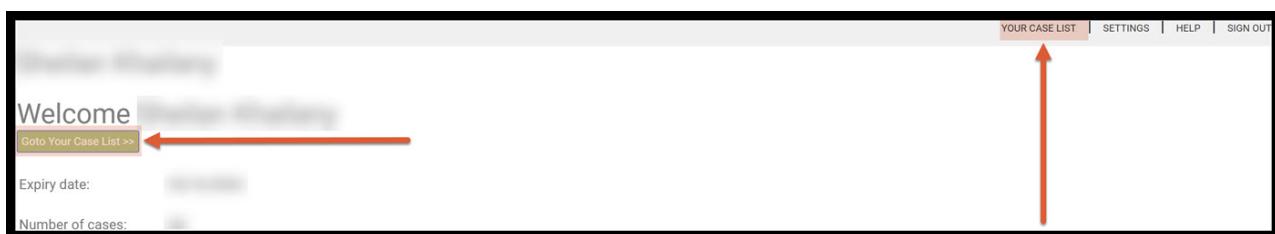
01/09/2026 11:37 am EST

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.



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

Your Case List

Add Case View All Cases Search Using Selection

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 Page 50 << No records >>

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Your Case List

Add Case View All Cases Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active

Rows Per Page 50 << Page 1 of 1 >>

Step 5: Recommendations: Click on the Recommendations subheading that is located on the right-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

Client Information

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

Case Title:

Description:

Client one: Last First Client two: Last First

Date of birth Initial plan age Short name

Current age Retirement age Gender:

Client two: Last First Short name

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

Selection tags: Active

List Clients Beneficiaries (optional)

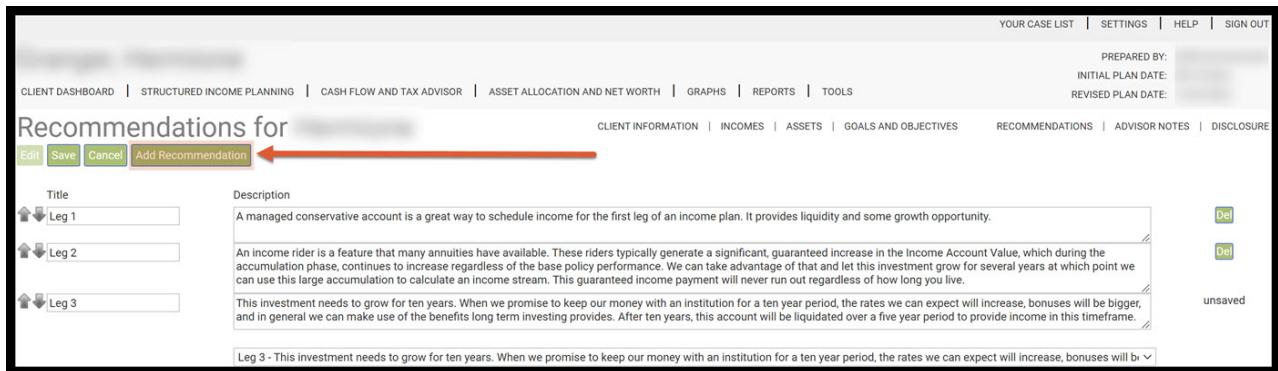
Step 6: Edit: Click on the green Edit button underneath the Recommendations for Client's Name heading.

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.

Step 8: Add Recommendation: Click on the green Add Recommendation button underneath the Recommendations for Client Name subheading.

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

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 OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

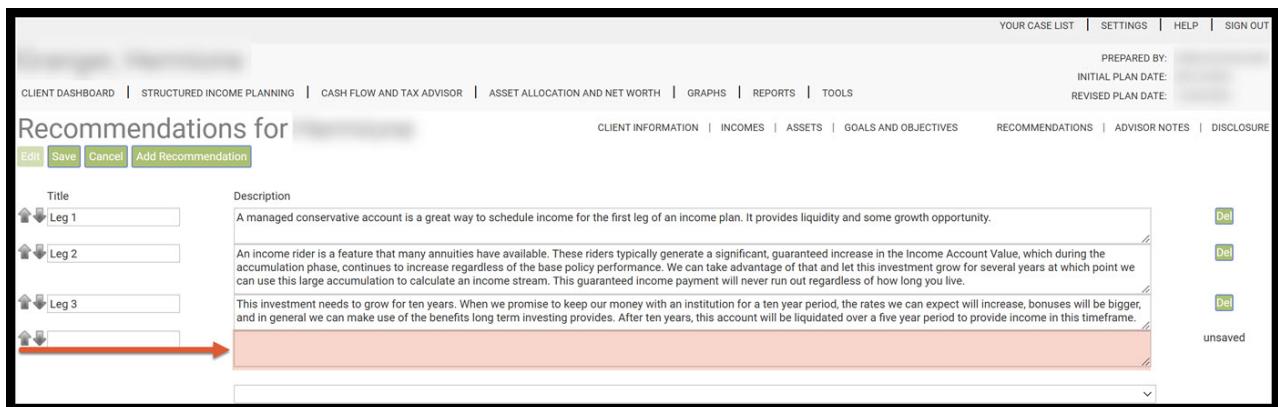
RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for

Edit Save Cancel Add Recommendation

Title	Description	Del
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 opportunity.	Del
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 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 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.	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 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.	unsaved

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



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

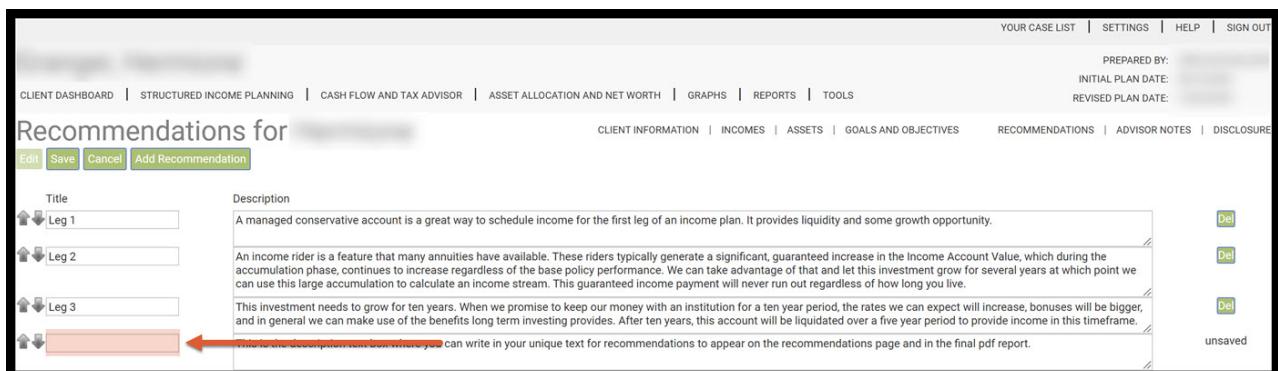
RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for

Edit Save Cancel Add Recommendation

Title	Description	Del
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 opportunity.	Del
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 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 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.	Del
	Where the description text box is highlighted with a red arrow.	unsaved

Step 12: Title TextBox: Click in the title text box and write in your unique title.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for

Edit Save Cancel Add Recommendation

Title	Description	Del
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 opportunity.	Del
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 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 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.	Del
Where the description text box is highlighted with a red arrow.	Where the title text box is highlighted with a red arrow.	unsaved

Step 13: Save: Click on the green Save button underneath the Recommendations for Clients Name subheading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for [REDACTED]

Edit **Save** **Cancel** **Add Recommendation**

Title

Le 1

Le 2

Le 3

Unique Title

Description

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 opportunity.

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 run out regardless of how long you live.

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.

This is the description text box where you can write in your unique text for recommendations to appear on the recommendations page and in the final pdf report.

Del **Del** **Del** **unsaved**

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for [REDACTED]

Edit

Title

- Leg 1
- Leg 2
- Leg 3
- Unique Title

Description

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 opportunity.

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 run out regardless of how long you live.

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.

This is the description text box where you can write in your unique text for recommendations to appear on the recommendations page and in the final pdf report.

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for [REDACTED]

Edit **Save** **Cancel** **Add Recommendation**

Title

Leg 1

Leg 2

Leg 3

Unique Title

Description

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 opportunity.

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 run out regardless of how long you live.

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.

This is the description text box where you can write in your unique text for recommendations to appear on the recommendations page and in the final pdf report.

Del **Del** **Del** **unsaved**

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for [REDACTED]

Edit Save Cancel Add Recommendation

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 opportunity.

Unique Title This is the description text box where you can write in your unique text for recommendations to appear on the recommendations page and in the final pdf report.

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 run out regardless of how long you live.

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.

Del Del Del Del

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?"

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVI

Recommendations for [REDACTED]

Edit Save Cancel Add Recommendation

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 opportunity.

Unique Title This is the description text box where you can write in your unique text for recommendations to appear on the recommendations page and in the final pdf report.

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 run out regardless of how long you live.

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.

OK Cancel

www.sipsplanning.net says

Are you sure you would like to permanently delete this recommendation?

Del Del Del Del

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for Hermione

Edit Save Cancel Add Recommendation

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 opportunity.

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 run out regardless of how long you live.

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.

Del Del Del Del

Step 19: Clicking: The finalized version of the description and text will be displayed.

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

Recommendations for [REDACTED]

Edit

- Title: Leg 1 Description: 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 opportunity.
- Leg 2 Description: 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 run out regardless of how long you live.
- Leg 3 Description: 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 Recommendations for client name click on the green edit button underneath the Recommendations for client name subheading.

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

Recommendations for [REDACTED]

Edit

- Title: Leg 1 Description: 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 opportunity.
- Leg 2 Description: 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 run out regardless of how long you live.
- Leg 3 Description: 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 21: Cancel: To go back to the previous page, click on the green Cancel button underneath the Recommendations for Client Name subheading.

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:

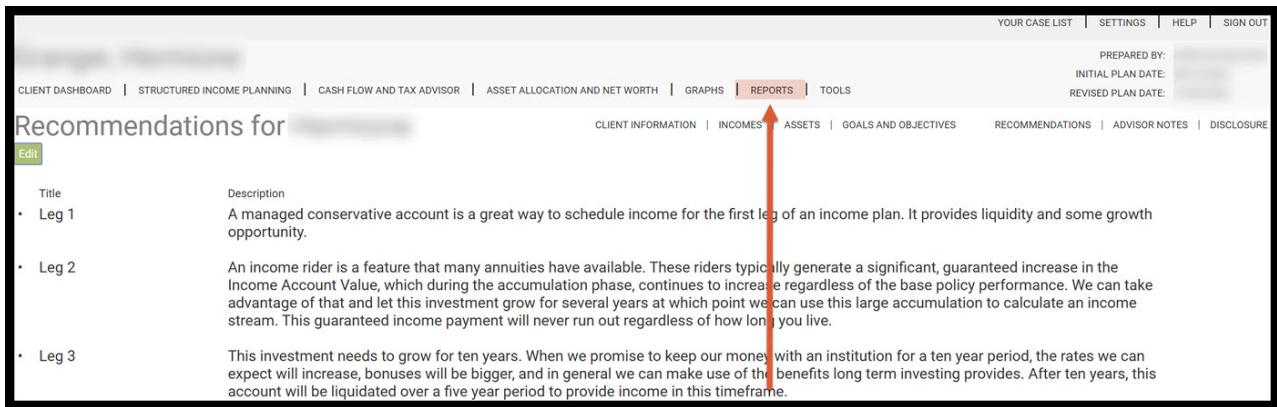
CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for [REDACTED]

Edit **Save** **Cancel** **Add Recommendation**

- Title: Leg 1 Description: 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 opportunity.
- Leg 2 Description: 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 run out regardless of how long you live.
- Leg 3 Description: 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 22: Reports: Click on the Reports subheading located in the middle of the screen.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | **REPORTS** | TOOLS

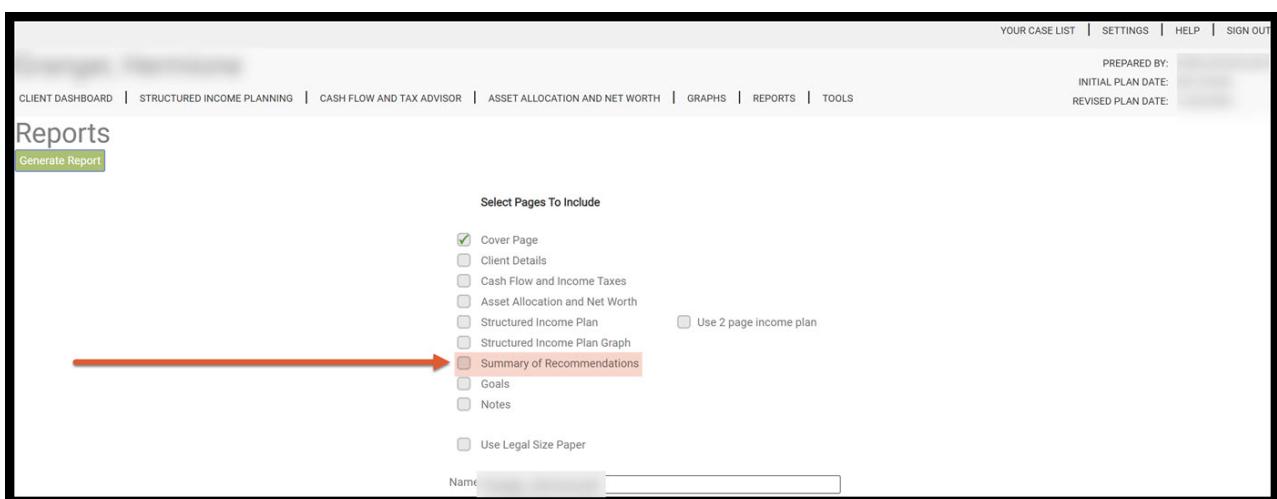
CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Recommendations for [REDACTED]

Edit

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 opportunity.
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 run out regardless of how long you live.
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 23: Summary of Recommendations Checkbox: Click on the Summary of Recommendations Checkbox.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

Reports

Generate Report

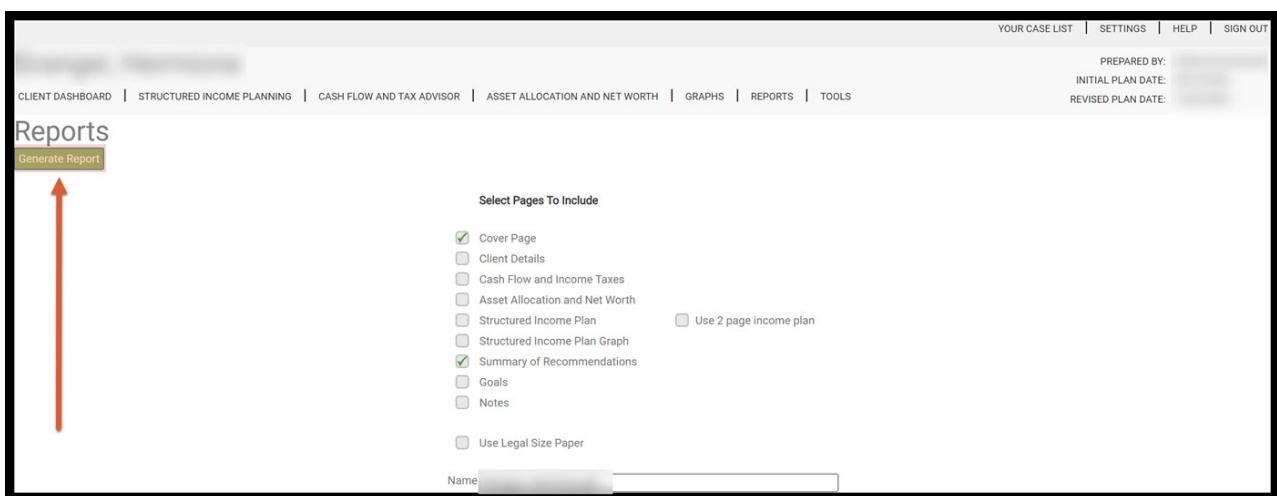
Select Pages To Include

Cover Page
 Client Details
 Cash Flow and Income Taxes
 Asset Allocation and Net Worth
 Structured Income Plan
 Structured Income Plan Graph
 Summary of Recommendations
 Goals
 Notes

Use 2 page income plan
 Use Legal Size Paper

Name: [REDACTED]

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



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

Reports

Generate Report

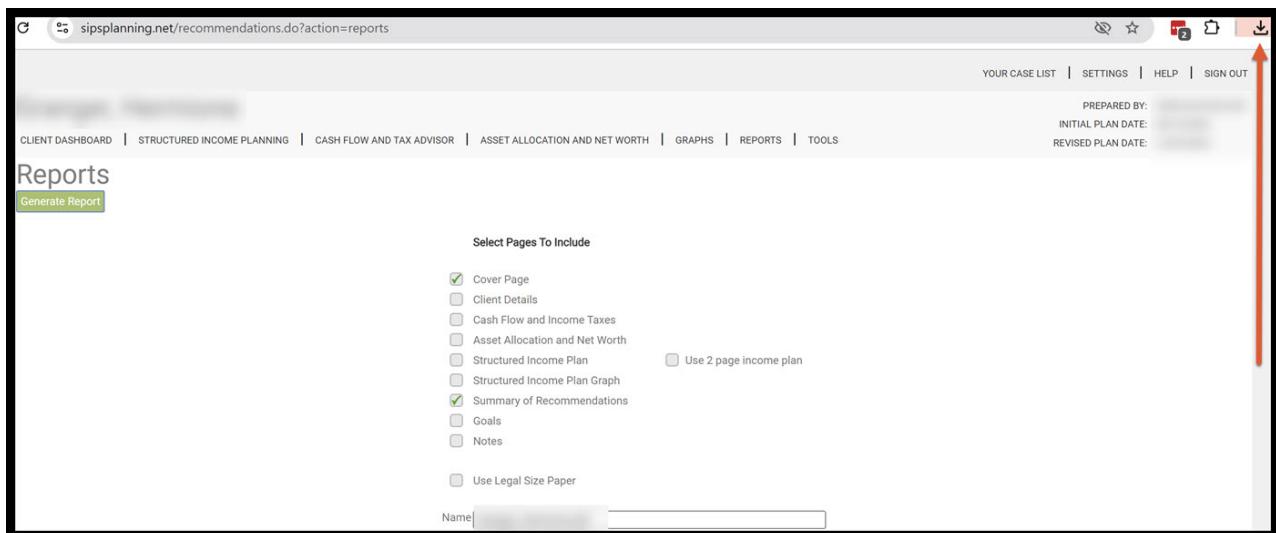
Select Pages To Include

Cover Page
 Client Details
 Cash Flow and Income Taxes
 Asset Allocation and Net Worth
 Structured Income Plan
 Structured Income Plan Graph
 Summary of Recommendations
 Goals
 Notes

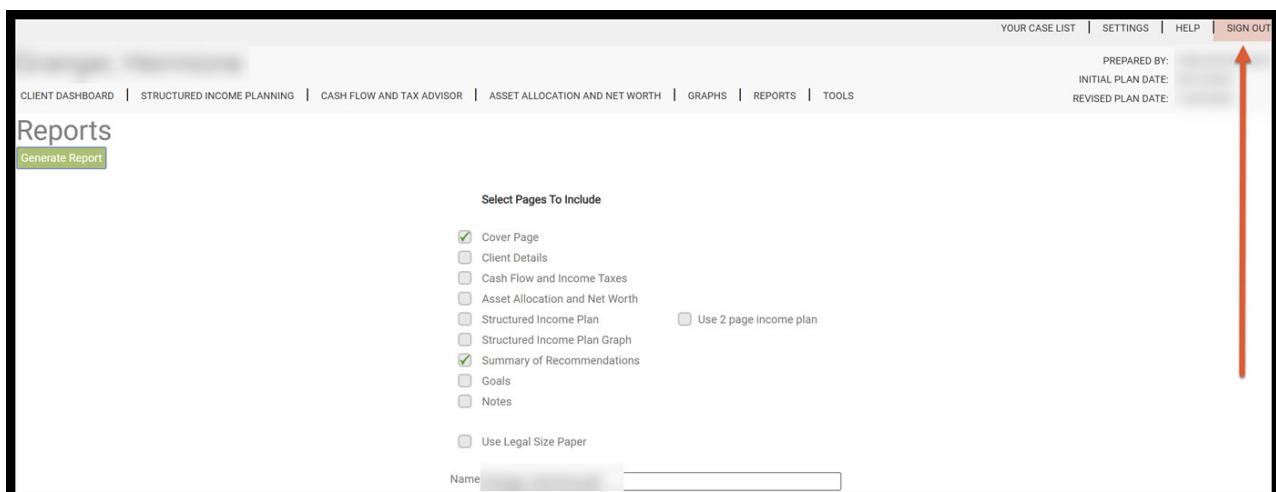
Use 2 page income plan
 Use Legal Size Paper

Name: [REDACTED]

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



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: support@planscout.com.