Disclosure

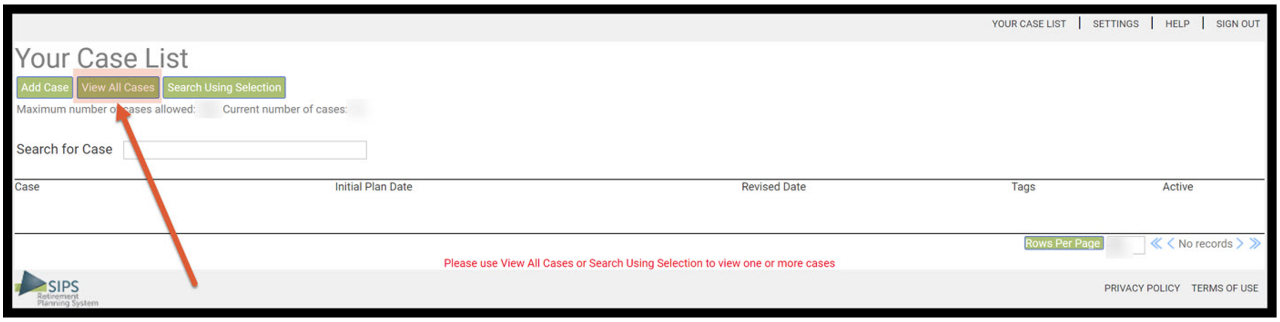
08/24/2024 3:40 pm EDT

This page in SIPS states what the disclosure policy is for SIPS when running a hypothetical report. This text also correlates with cover page text when running the report feature. This documentation cannot be edited. Below are the step by step guidelines to get to the disclosure page.

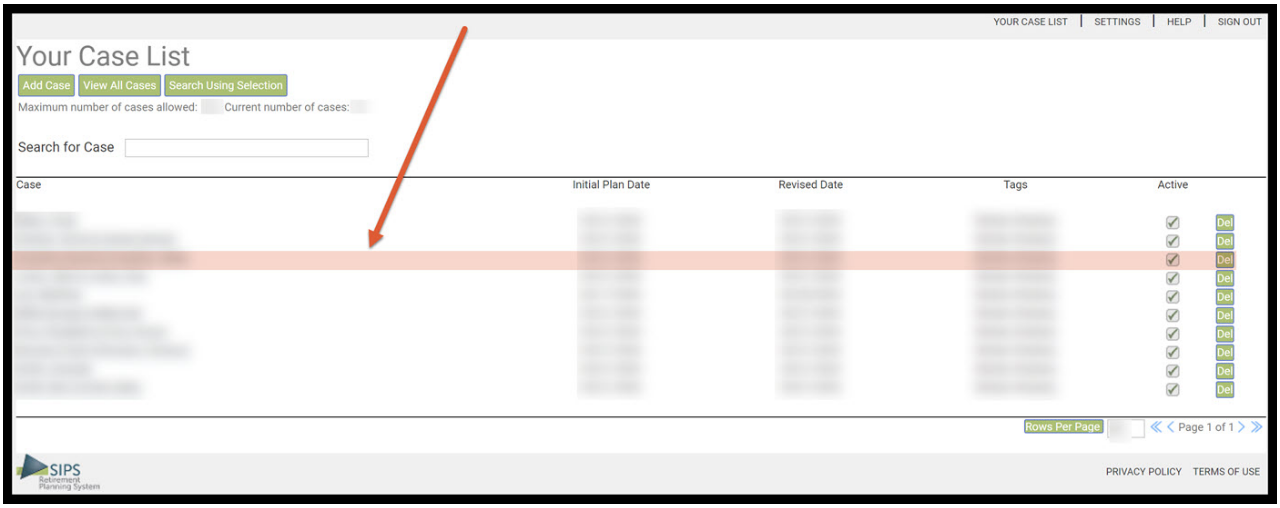
Step 1: Log In: Log into SIPS.

Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.

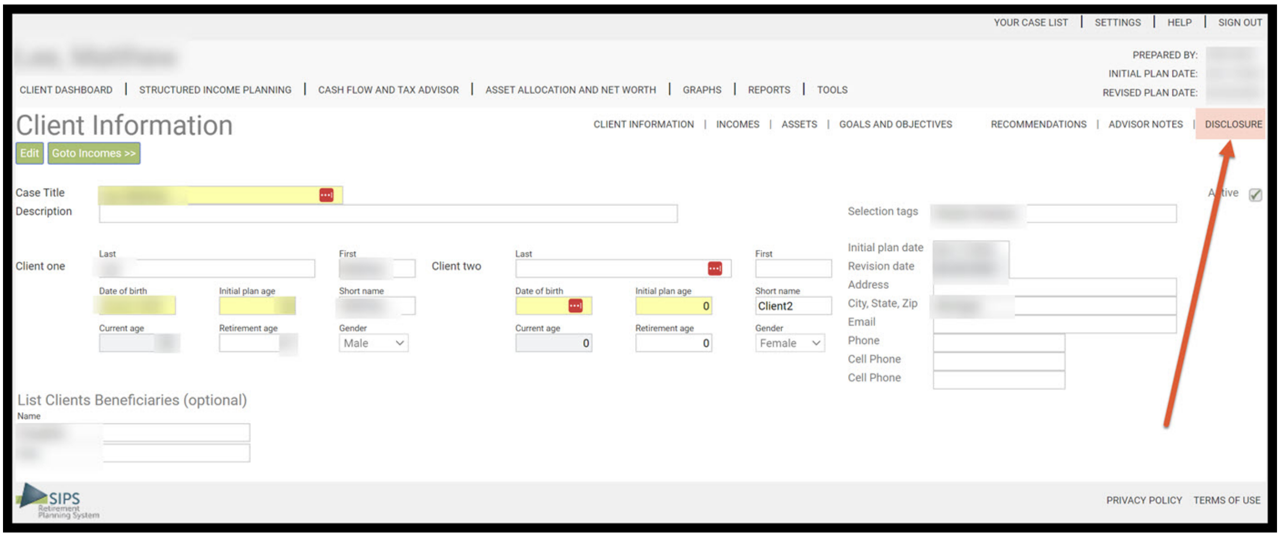
Step 3: View All Cases: Click on the View All Cases button to see the list of all of your cases.



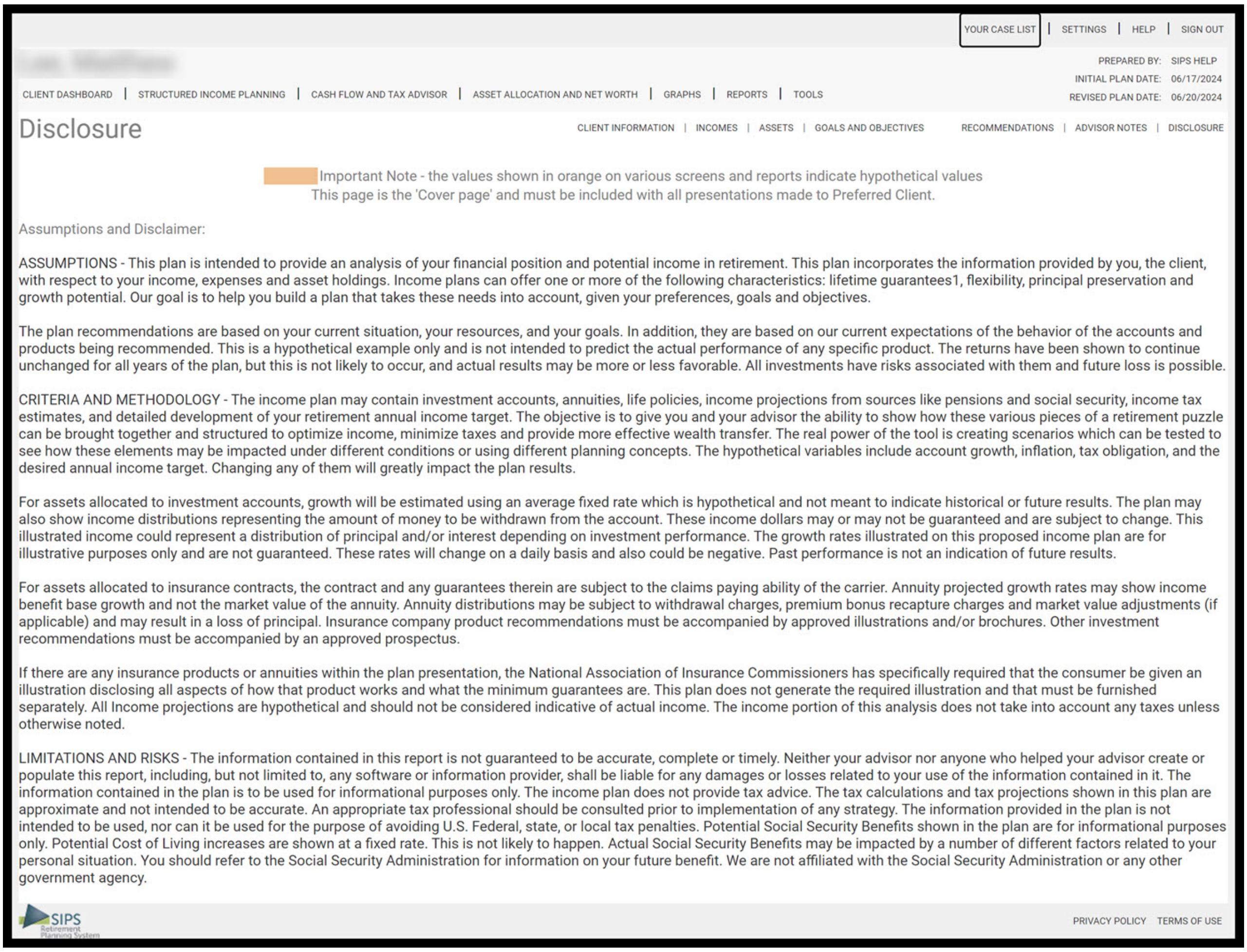
Step 4: Selection: Select which case you would like to open up. Double click on the case to open it up to take you to the client information page.



Step 5: Disclosure: Click on the Disclosure subheading. This subheading is stationary throughout all the pages that correlate with the client dashboard. The client dashboard pages are the client information, income, assets, goals and objectives, recommendations, advisor notes, disclosure.



Step 6: Disclosure Statement: This documentation on this screen is what the disclosure statement is shown in the report in relation to the cover page.



Step 7: Logout: To log out of SIPS click on the Sign Out heading that is located in the upper righthand 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.