

Entering in Your Company Contact Information into SIPS

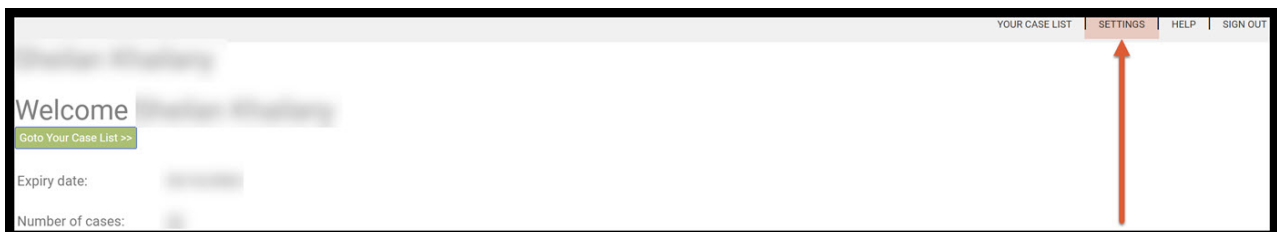
01/02/2026 9:12 am EST

You can access the preference page through the settings button. On the preference page you can update your password, enter your email address, and provide your company's contact information. The company's contact information that you have provided will be Company's contact information that will be provided on the cover page for the report. Below is a step-by-step guideline for entering in your company's contact information.

Step 1: Login: Login to SIPS.



Step 2: Settings: Click on the Settings button located in the upper right hand side of the screen.



Step 3: Company Name Text Box: Enter in the Company Name.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

Save Cancel Select New Logo (*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload

User id
Old password
New password
Please re-enter new password
Email address

Company Name
Company Address
Company Address
Company Phone
Company Website
Company Email

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 4: Company Address Text Box: Enter in the Company Address.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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Save Cancel Select New Logo (*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload

User id
Old password
New password
Please re-enter new password
Email address

Company Name
Company Address
Company Address
Company Phone
Company Website
Company Email

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 5: Company Phone Text Box: Enter in the Company Phone text box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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Save Cancel Select New Logo (*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload

User id
Old password
New password
Please re-enter new password
Email address

Company Name
Company Address
Company Address
Company Phone
Company Website
Company Email

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 6: Company Website Text Box: Enter in the Company Website URL.

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Save Cancel Select New Logo (*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload

User id
Old password
New password
Please re-enter new password
Email address

Company Name
Company Address
Company Address
Company Phone
Company Website
Company Email

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 7: Company Email Text Box: Enter in the company email address.

The screenshot shows the 'Preferences' page with a navigation bar at the top containing 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar is a sub-header with 'PREFERENCES', 'RECOMMENDATIONS', 'CUSTOM RETURN RATES', 'CUSTOM GROUPING OPTIONS', 'DISCLOSURE', and 'ALLOCATION CODES'. The main content area has a 'Save' button, a 'Cancel' button, and a 'Select New Logo' button with a file input field and an 'Upload' button. The form fields are organized into two sections. The first section includes 'User id', 'Old password', 'New password', 'Please re-enter new password', and 'Email address'. The second section includes 'Company Name', 'Company Address', 'City, State, Zip Code', 'Company Phone', 'Company Website', and 'Company Email'. The 'Company Email' field is highlighted with a red box, and a red arrow points to it from the right.

Step 8: Save: Click on the green Save button underneath the Preferences heading.

The screenshot shows the 'Preferences' page with the same navigation bar and sub-header as the previous screenshot. The 'Save' button is highlighted with a red box, and a red arrow points to it from the left.

Step 9: Your Case List: Click on Your Case List Button located on the right-hand side of your screen.

The screenshot shows the 'Preferences' page with the same navigation bar and sub-header. The 'YOUR CASE LIST' button in the navigation bar is highlighted with a red box, and a red arrow points to it from the right.

Step 10: View All Cases: Click on the green View All Cases underneath the Your Case List heading.

The screenshot shows the 'Your Case List' page with a navigation bar at the top containing 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar is a sub-header with 'YOUR CASE LIST', 'RECOMMENDATIONS', 'CUSTOM RETURN RATES', 'CUSTOM GROUPING OPTIONS', 'DISCLOSURE', and 'ALLOCATION CODES'. The main content area has a 'Add Case' button, a 'View All Cases' button, and a 'Search Using Selection' button. Below these buttons is a 'Search for Case' input field. Below the search field is a table with columns: 'Case', 'Initial Plan Date', 'Revised Date', 'Tags', and 'Active'. The 'View All Cases' button is highlighted with a red box, and a red arrow points to it from the left. At the bottom of the page, there is a red message: 'Please use View All Cases or Search Using Selection to view one or more cases'. On the right side, there is a 'Rows Per Page' dropdown set to '50' and a 'No records' message.

Step 11: Case Selection: Select a case.

Step 14: Download the PDF: Download the PDF.

sipsplanning.net/case.do?action=reports

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: [REDACTED]
INITIAL PLAN DATE: [REDACTED]
REVISED PLAN DATE: [REDACTED]

Reports

[Generate Report](#)

Select Pages To Include

- ☒ Cover Page
- ☐ 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: [REDACTED]

Step 15: Cover Page: The company contact information should be displayed on the cover page.

Structured Income Plan

Prepared For: [REDACTED]

Prepared On: [REDACTED]

Prepared By: [REDACTED]

Company Name
1234 Anywhere Street
City, State, Zip Code
000-000-0000
www.yourcompanywebsite.com
firstname.lastname@company.com

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.