

Downloading the Report for Your Clients

01/09/2026 11:40 am EST

Within the SIPS program, you can generate a report to provide to your clients outlining the structured income plan. Below is the step-by-step guideline for downloading the report.

Step 1: Logging In: Log into SIPS.



Step 2: Your Case List: Click on the Your Case List button located on the upper right-hand side of your screen.



Step 3: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.

Step 6: Select Pages to Include: Click on the different checkboxes for the pages you would like to include in the report.

The screenshot shows the SIPS Reports page. At the top, there is a navigation bar with links: CLIENT DASHBOARD, STRUCTURED INCOME PLANNING, CASH FLOW AND TAX ADVISOR, ASSET ALLOCATION AND NET WORTH, GRAPHS, REPORTS, and TOOLS. The 'REPORTS' link is highlighted. Below the navigation bar, the 'Reports' heading is displayed, followed by a green 'Generate Report' button. A red arrow points to the 'Select Pages To Include' section, which contains a list of checkboxes for selecting report pages. The 'Cover Page' checkbox is checked, while the others are unchecked. The 'Use Legal Size Paper' checkbox is also unchecked. A 'Name' input field is visible at the bottom.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: DEMO ADVISOR
INITIAL PLAN DATE: 08/14/2024
REVISED PLAN DATE: 12/11/2024

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 Legal Size Paper

☐ Use 2 page income plan

Name

Step 7: Generate Report: Click on the green Generate Report button underneath the Reports heading.

This screenshot is identical to the previous one, showing the SIPS Reports page. A red arrow now points to the green 'Generate Report' button, which is located directly beneath the 'Reports' heading.

Step 8: Download the PDF: Download the PDF.

sipsplanning.net/case.do?action=reports

SIPS

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: DEMO ADVISOR

INITIAL PLAN DATE: 08/14/2024

REVISED PLAN DATE: 12/11/2024

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 Legal Size Paper

☐ Use 2 page income plan

Name

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.