

Downloading the Report for Your Clients

12/11/2024 3:47 pm 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.

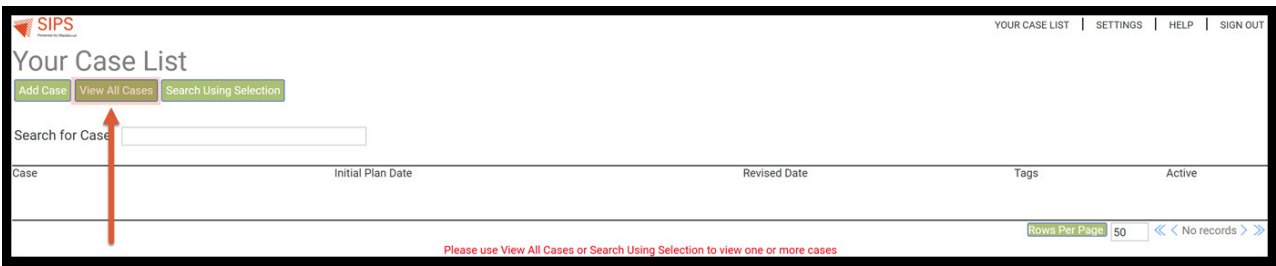
Step 1: Logging In: Log into SIPS.



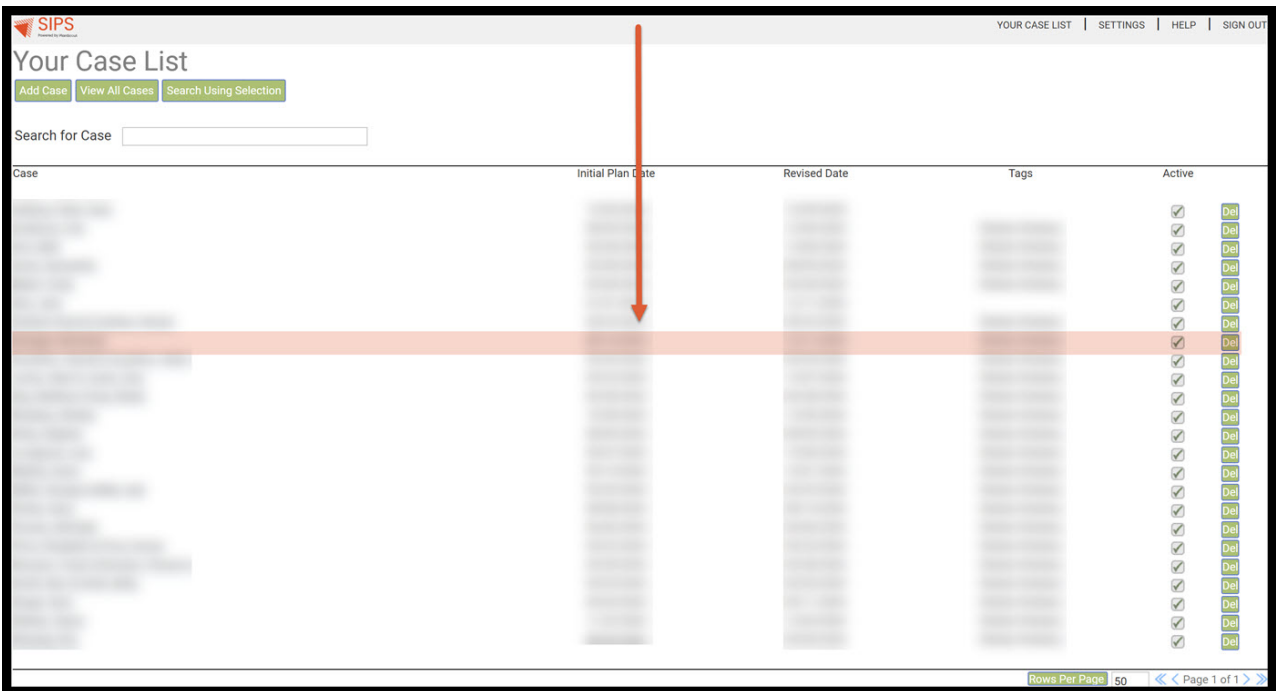
Step 2: Your Case List: Click on the Your Case List button located on the upper right-hand side of your screen.



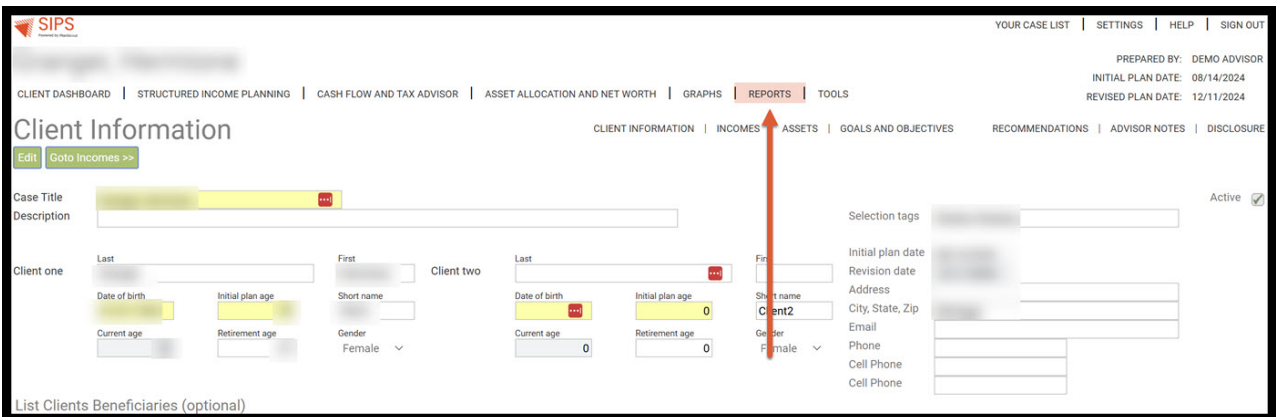
Step 3: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



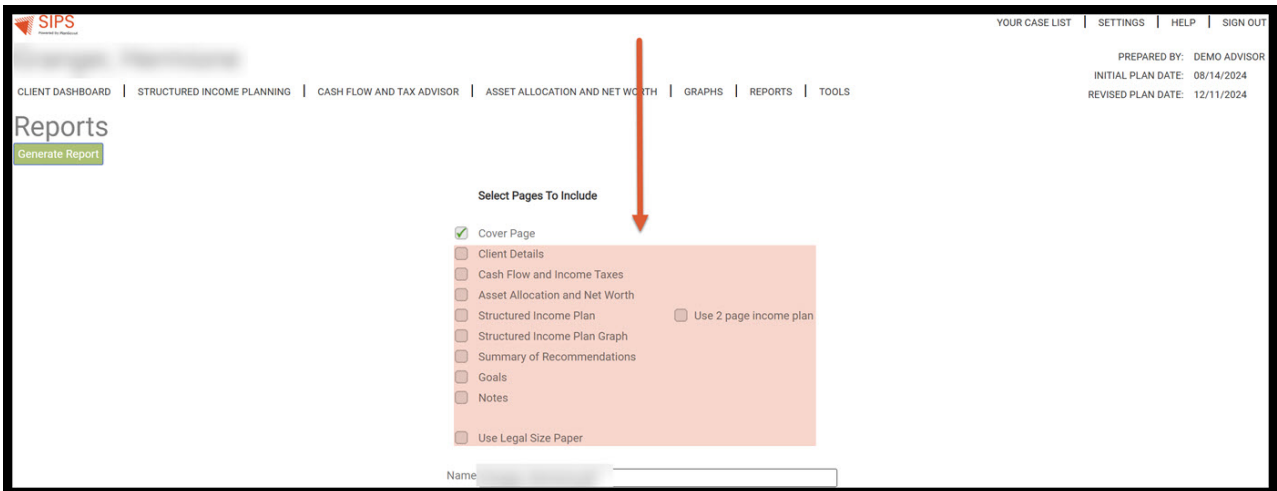
Step 4: Case Selection: Select a Case.



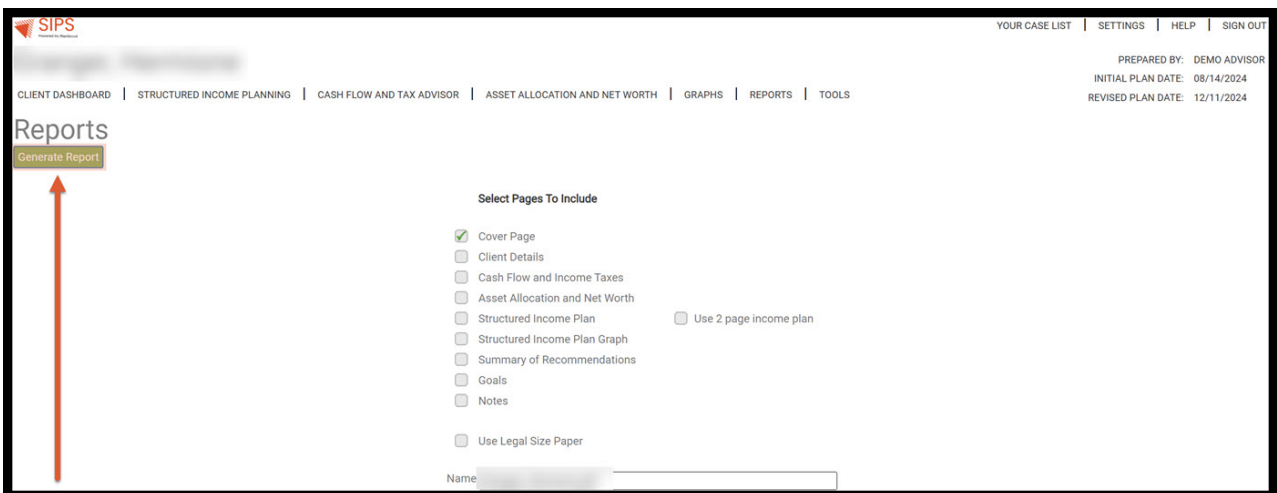
Step 5: Reports: Click on the Reports button located in the middle of the screen.



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



Step 7: Generate Report: Click on the green Generate Report button underneath 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

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 Use 2 page income plan
- Structured Income Plan Graph
- Summary of Recommendations
- Goals
- Notes
- Use Legal Size Paper

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: +1-888-449-6917 or support@planscout.com.
