

# 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.

SIPS
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
 No records

Please use View All Cases or Search Using Selection to view one or more cases

#### Step 4: Case Selection: Select a Case.

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



The screenshot shows the SIPS software interface. At the top, there is a navigation bar with links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar, there is a sub-navigation bar with links for 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS' (which is highlighted in red), and 'TOOLS'. The main title 'Client Information' is displayed prominently. Below the title, there are buttons for 'Edit' and 'Goto Incomes >'. The 'REPORTS' menu is expanded, showing sub-links: 'CLIENT INFORMATION', 'INCOMES' (which is highlighted in red), 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The 'INCOMES' link is highlighted with a red arrow. On the left, there is a form for 'Client one' with fields for 'Last' name, 'First' name, 'Short name', 'Date of birth', 'Initial plan age', 'Current age', 'Retirement age', and 'Gender' (set to 'Female'). On the right, there is a form for 'Client two' with similar fields. Below the client forms, there is a section for 'List Clients Beneficiaries (optional)' with a table showing 'Selection tags' and 'Initial plan date', 'Revision date', 'Address', 'City, State, Zip', 'Email', 'Phone', 'Cell Phone', and 'Cell Phone'. The 'Initial plan date' field is highlighted with a red arrow.

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

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 2 page income plan  
 Use Legal Size Paper

Name

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

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

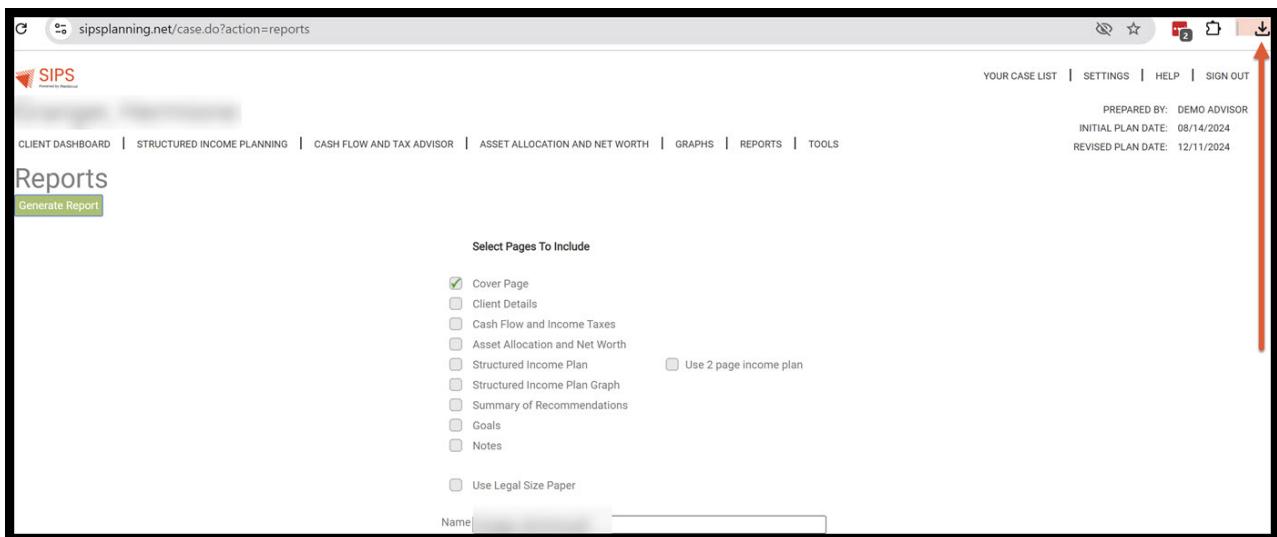
Generate Report

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 2 page income plan  
 Use Legal Size Paper

Name

Step 8: Download the PDF: Download the PDF.



The screenshot shows a web browser window for [sipsplanning.net/case.do?action=reports](http://sipsplanning.net/case.do?action=reports). The interface is for a financial planning tool named SIPS. At the top, there are links for 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. On the right, there are links for 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these, it says 'PREPARED BY: DEMO ADVISOR', 'INITIAL PLAN DATE: 08/14/2024', and 'REVISED PLAN DATE: 12/11/2024'. The main content area is titled 'Reports' and contains a 'Generate Report' button. Below this is a section titled 'Select Pages To Include' with a list of checkboxes. The 'Cover Page' checkbox is checked. Other options include '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', and 'Use Legal Size Paper'. A 'Name' input field is also present. The top right corner of the browser window has a red arrow pointing to the 'Download' icon.

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](mailto:support@planscout.com).