

04/27/2025 SIPS software update

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On April 27, 2025, the following updates were released in SIPS:

A bug fix to correctly display initial plan age of each client on the income planning screen has been implemented. The initial plan age on the income plan will now match the initial plan age on the client dashboard.

Two new account types are now live: 401a, RSU / PSU. The 401a account type will follow the same rules as a 401k account type and the RSU / PSU account type will follow the same rules as a non-qualified "NQ" account type.

Need more help?

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