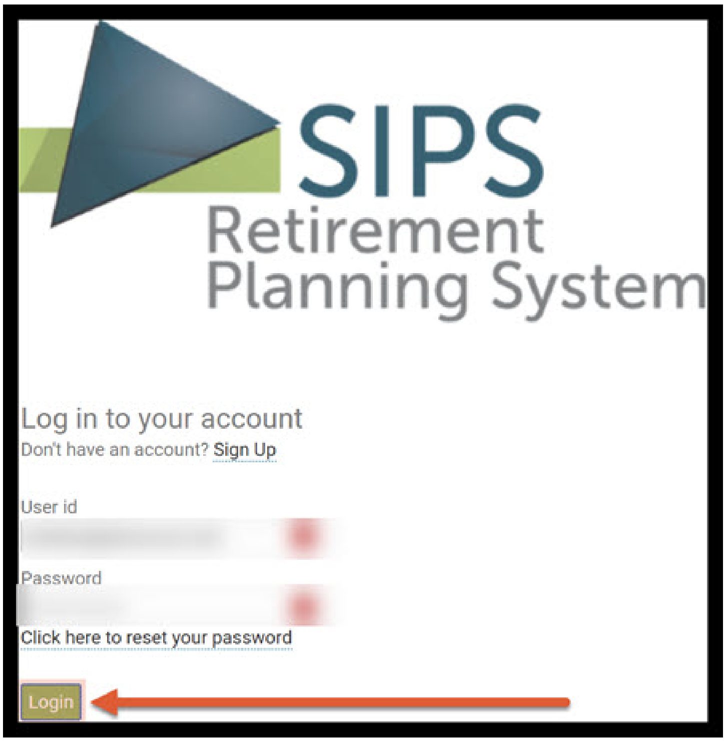
Accessing the Disclosure Page

12/06/2024 12:47 pm EST

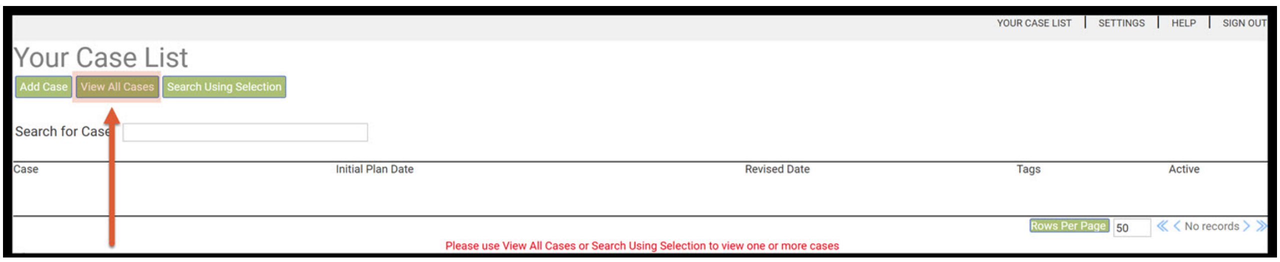
This page in SIPS provides the disclosure policy for running a hypothetical report. The content here corresponds with the notes page when using the report feature. Below are step-by-step instructions for opening and viewing the disclosure page.

Step 1: Log In: Log into SIPS.

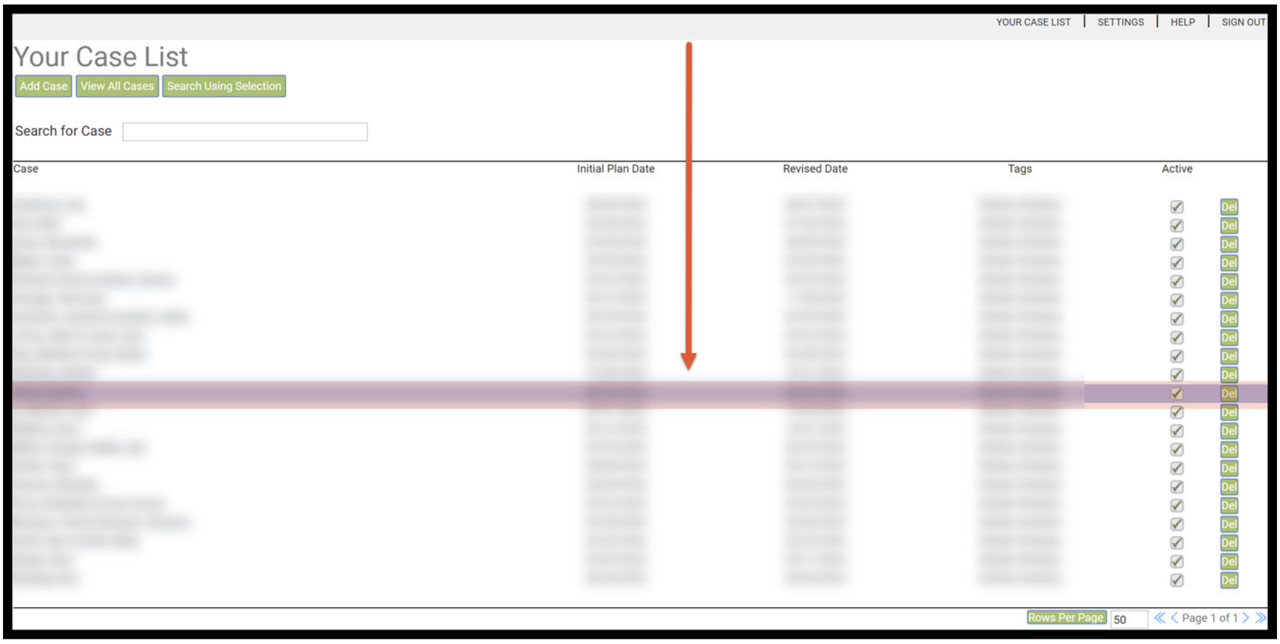


Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.

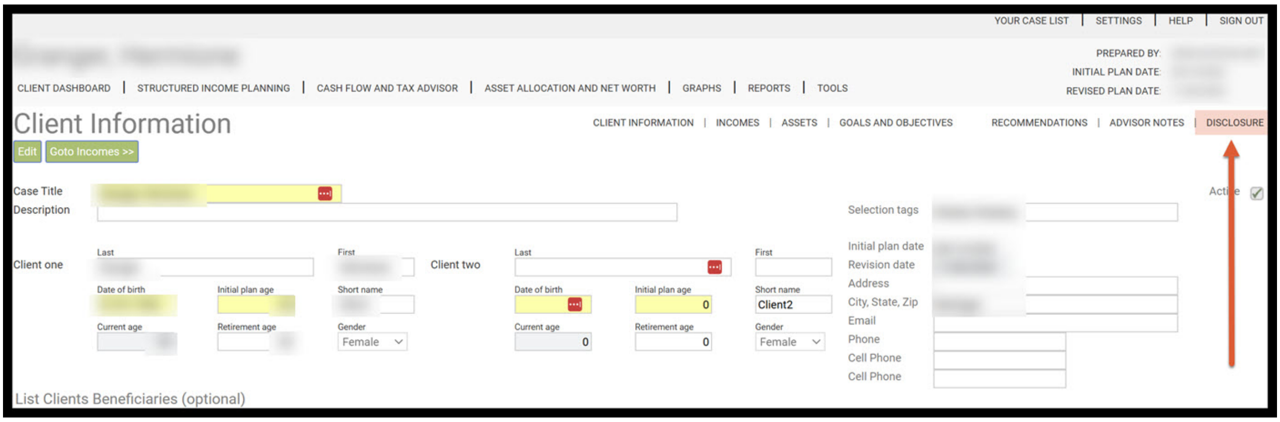
Step 3: View All Cases: Click on the green View All Cases button undnerneath the Your Case List heading.



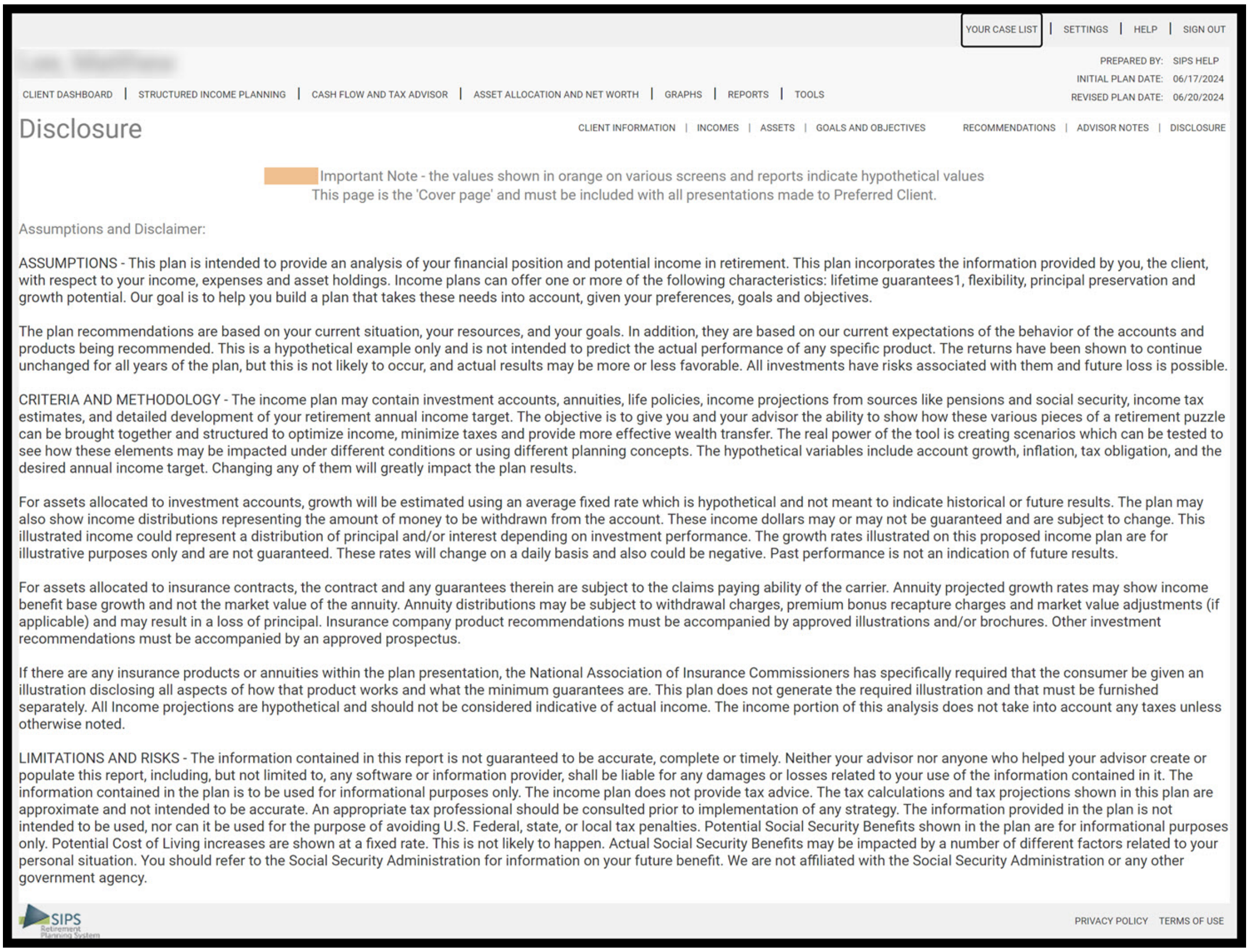
Step 4: Case Selection: Click on the case you would like to open up.



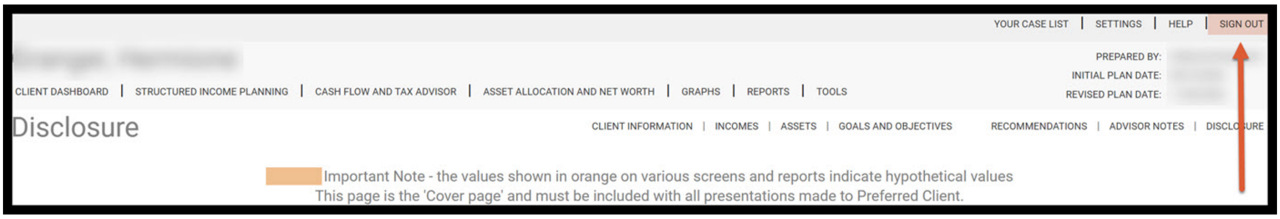
Step 5: Disclosure: Click on the Disclosure subheading, which remains accessible across all pages within the client dashboard. The client dashboard pages include client information, incomes, assets, goals and objectives, recommendations, advisor notes, and disclosure.



Step 6: Disclosure Statement: The information on this screen represents the disclosure statement that appears in the report, corresponding to the cover page.



Step 7: Logout: To log out of SIPS click on the Sign Out heading that is located in the upper righthand side of the screen.



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.