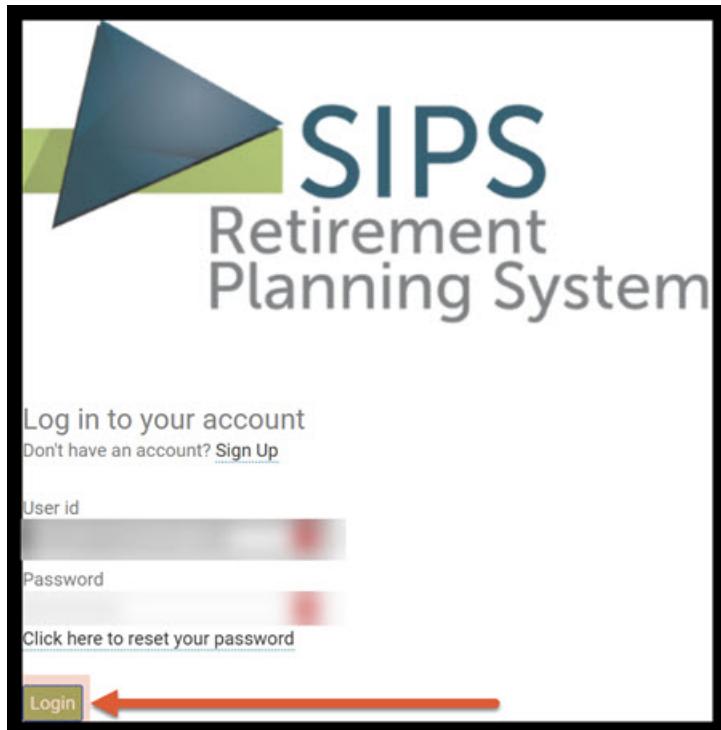


# Creating Custom Text to the Disclosure Page and Final Report

01/09/2026 11:38 am EST

Under the Settings option, you can access the Disclosure page. On the Default Disclosure page, you can customize the Standard Assumptions and Disclaimer by adding unique text. Below is a step-by-step guide for adding unique text to the Standard Assumptions and Disclaimer, which will appear in the final report for the client.

Step 1: Log In: Log into SIPS.



Step 2: Settings: Click on the settings button that is located in the upper right-hand side of the screen.



Step 3: Disclosure: Click on the disclosure button that is located in the upper-right hand side of the screen.

Preferences

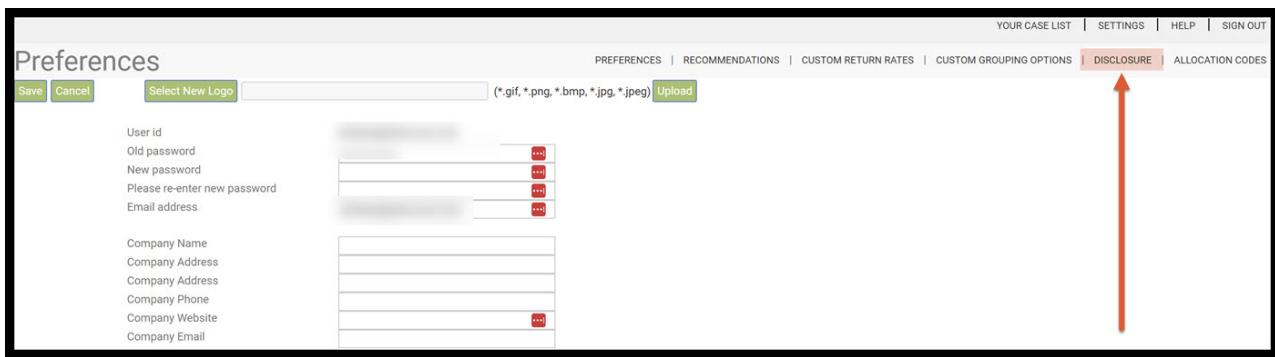
YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | **DISCLOSURE** | ALLOCATION CODES

Save | Cancel | Select New Logo | (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) | Upload

User id  
Old password  
New password  
Please re-enter new password  
Email address

Company Name  
Company Address  
Company Address  
Company Phone  
Company Website  
Company Email



Step 4: Enter Additional Assumption and Disclosure Textbox: At the bottom of the screen click in the text box and write in your unique text.

Default Disclosure

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | **DISCLOSURE** | ALLOCATION CODES

Save | Cancel

This page is the 'Cover page' and must be included with all presentations made to Preferred Client.

Standard Assumptions and Disclaimer:

**ASSUMPTIONS** - This plan is intended to provide an analysis of your financial position and potential income in retirement. This plan incorporates the information provided by you, the client, with respect to your income, expenses, and asset holdings. Income plans can offer one or more of the following characteristics: lifetime guarantees, flexibility, principal preservation, and growth potential. Our goal is to help you build a plan that takes these needs into account, given your preferences, goals and objectives.

The plan recommendations are based on your current situation, your resources, and your goals. In addition, they are based on our current expectations of the behavior of the accounts and products being recommended. This is a hypothetical example only and is not intended to predict the actual performance of any specific product.

The growth rates are hypothetical and have been shown to continue unchanged for all years of the plan, but this is not likely to occur, and actual results may be more or less favorable. All investments have risks associated with them and future loss is possible.

**CRITERIA AND METHODOLOGY** - The income plan may contain investment accounts, annuities, life policies, income projections from sources like pensions and social security, income tax estimates, and detailed development of your retirement annual income target. The objective is to give you and your advisor the ability to show how these various pieces of a retirement puzzle can be brought together and structured to optimize income, minimize taxes, and provide more effective wealth transfer. The real power of the tool is creating scenarios which can be tested to see how these elements may be impacted under different conditions or using different planning concepts. The hypothetical variables include account growth, inflation, tax obligation, and the desired annual income target. Changing any of them will greatly impact the plan results.

For assets allocated to investment accounts, growth will be estimated using an average fixed rate which is hypothetical and not meant to indicate historical or future results. The plan may also show income distributions representing the amount of money to be withdrawn from the account. These income dollars may or may not be guaranteed and are subject to change. This illustrated income could represent a distribution of principal and/or interest depending on investment performance. The growth rates illustrated on this proposed income plan are for illustrative purposes only and are not guaranteed. These rates will change on a daily basis and also could be negative. Past performance is not an indication of future results.

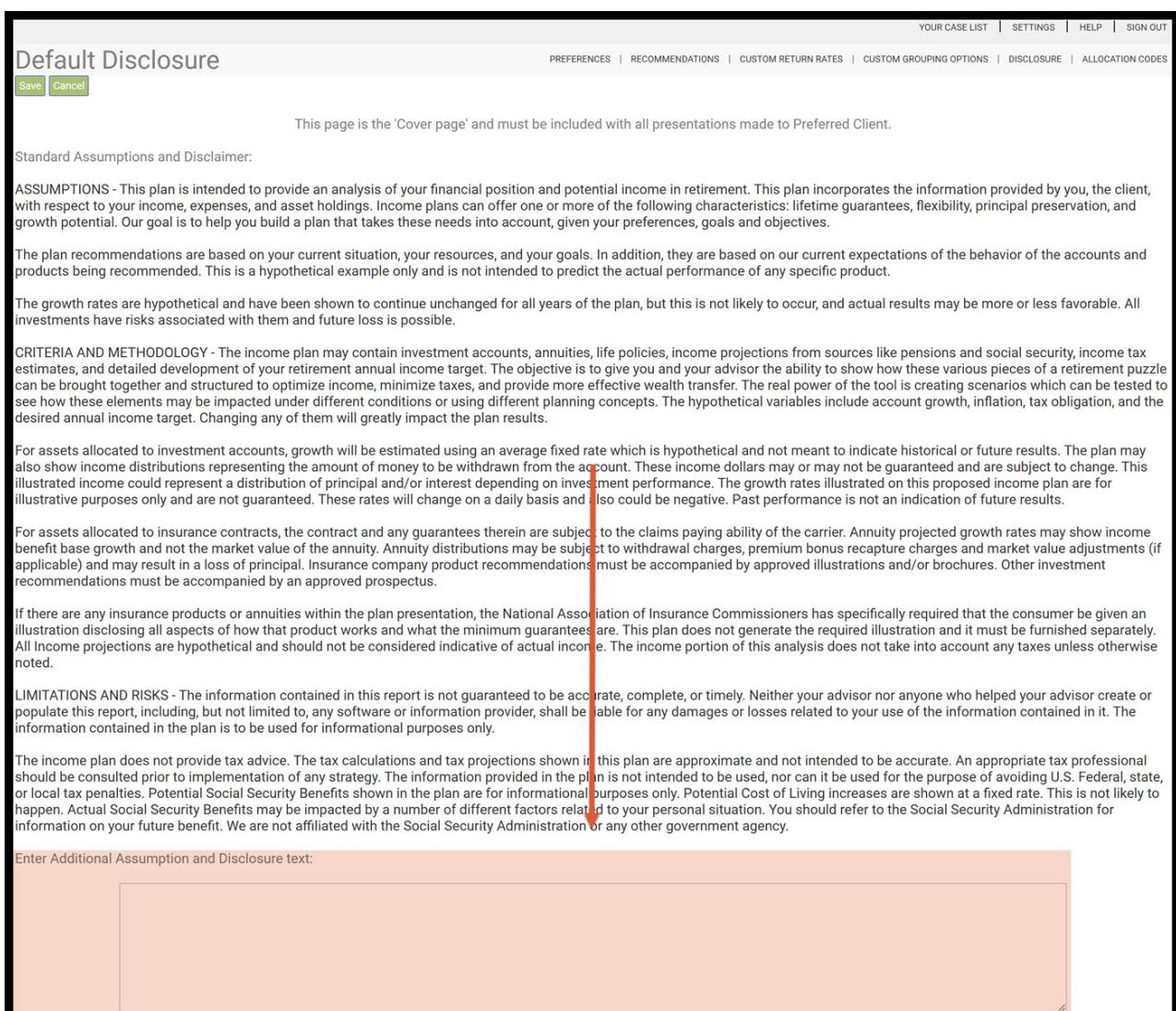
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**LIMITATIONS AND RISKS** - The information contained in this report is not guaranteed to be accurate, complete, or timely. Neither your advisor nor anyone who helped your advisor create or populate this report, including, but not limited to, any software or information provider, shall be liable for any damages or losses related to your use of the information contained in it. The information contained in the plan is to be used for informational purposes only.

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Enter Additional Assumption and Disclosure text:



Step 5: Save: Click on the green save button underneath the Disclosure heading.

Default Disclosure

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save Cancel

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Enter Additional Assumption and Disclosure text:

This hypothetical report was created by first name, last name, credentials, company name, address, contact information.

Step 6: Your Case List: Click on Your Case List button located in the upper right hand side of the screen.

Default Disclosure

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save Cancel

This page is the 'Cover page' and must be included with all presentations made to Preferred Client.

Standard Assumptions and Disclaimer:

Step 7: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.

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

Rows Per Page 50 << No records >>

Step 8: Case Selection: Click on a case.

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
(A single row is highlighted in purple, indicating it is selected.)				
Rows Per Page 50 << Page 1 of 1 >>				

Step 9: Disclosure: Click on the Disclosure button located in the upper right hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

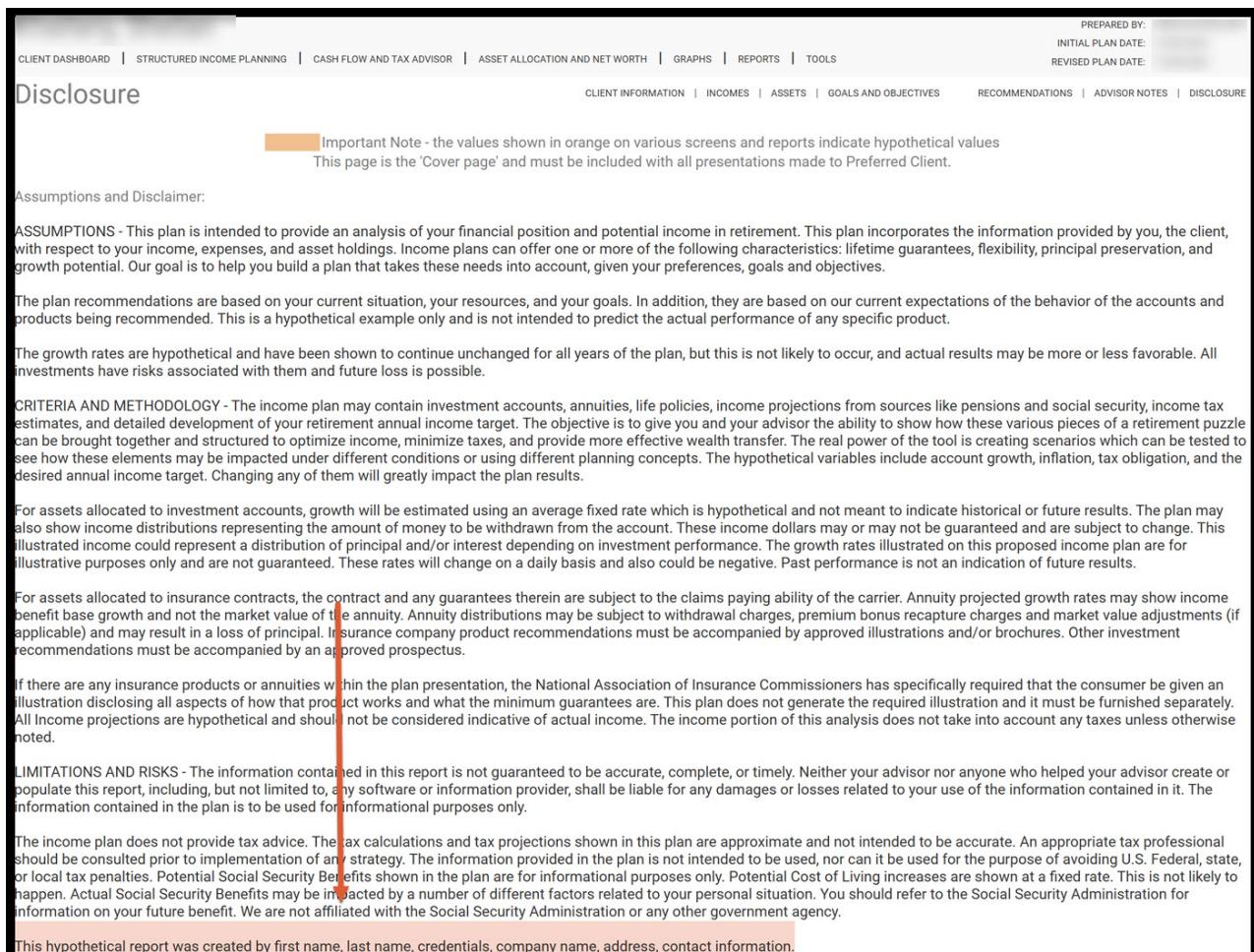
## Client Information

Edit Goto Incomes >>

Case Title	Description	Selection tags						
Client one	Last Date of birth Current age	First Initial plan age Retirement age	Client two	Last Date of birth Current age	First Initial plan age Retirement age	Client two	First Short name Gender	Initial plan date Revision date Address City, State, Zip Email Phone Cell Phone Cell Phone
List Clients Beneficiaries (optional)								

Active

## Step 10: Unique Text: The unique text should be displayed at the bottom of the screen.



CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

## Disclosure

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

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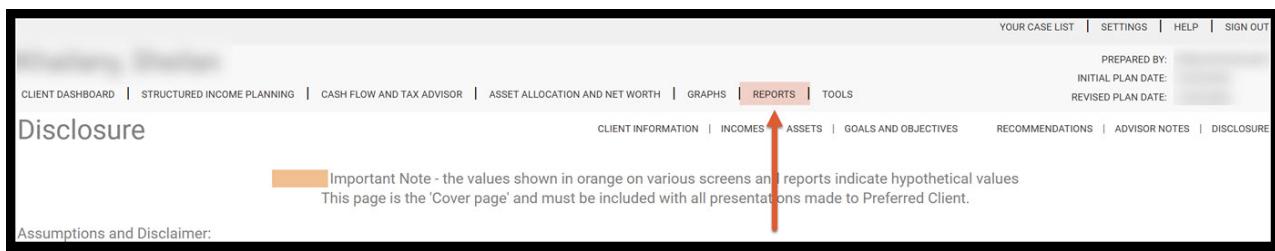
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## Step 11: Reports: Click on the Reports button in the center of the screen.



CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | **REPORTS** | TOOLS

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

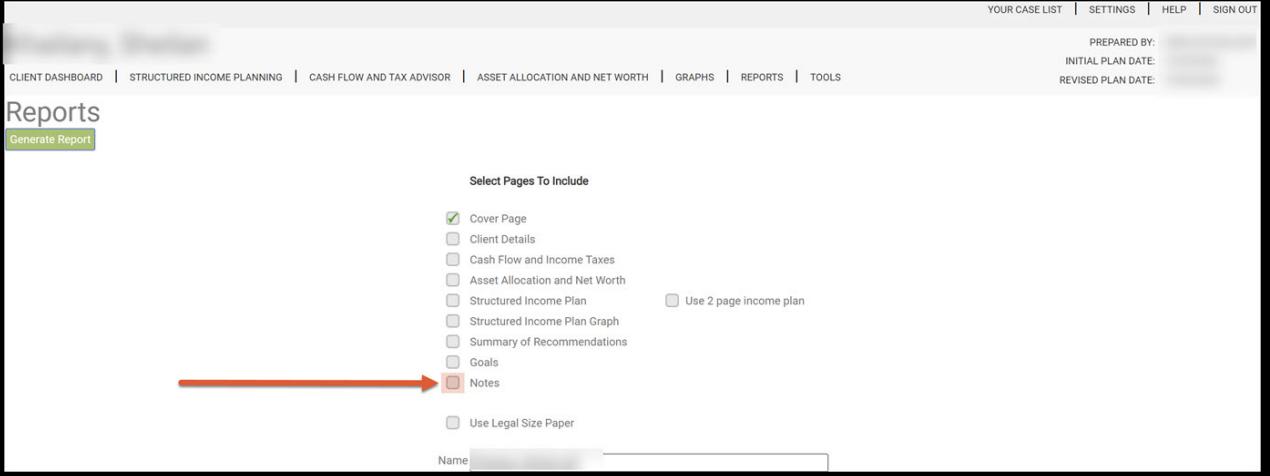
## Disclosure

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

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Assumptions and Disclaimer:

## Step 12: Notes Checkbox: Click on the Notes checkbox.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Reports

Generate Report

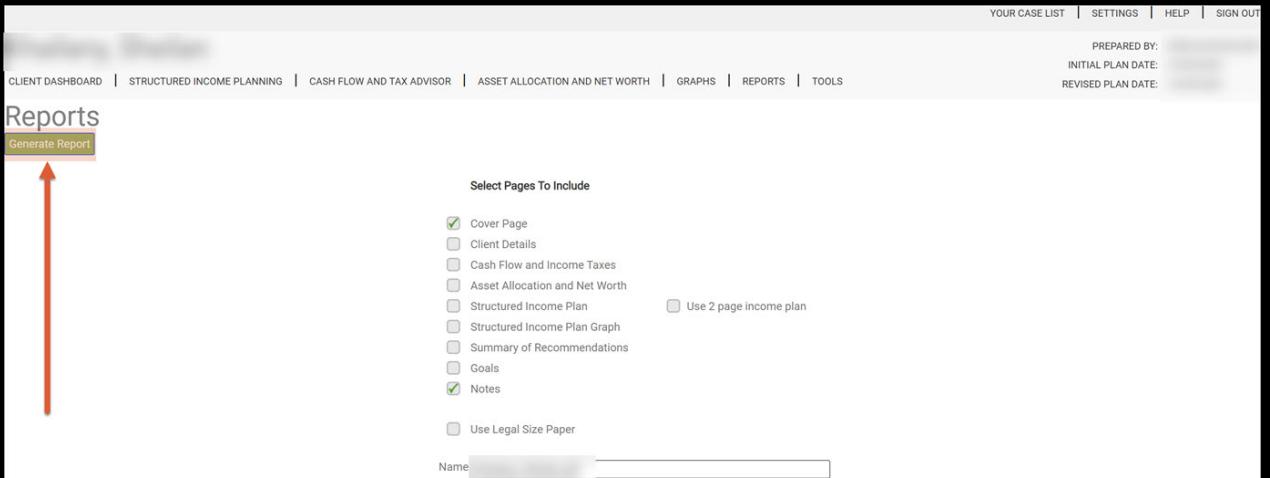
Select Pages To Include

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 13: Generate Report: Click on the green Generate Report button underneath the Reports subheading.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Reports

Generate Report

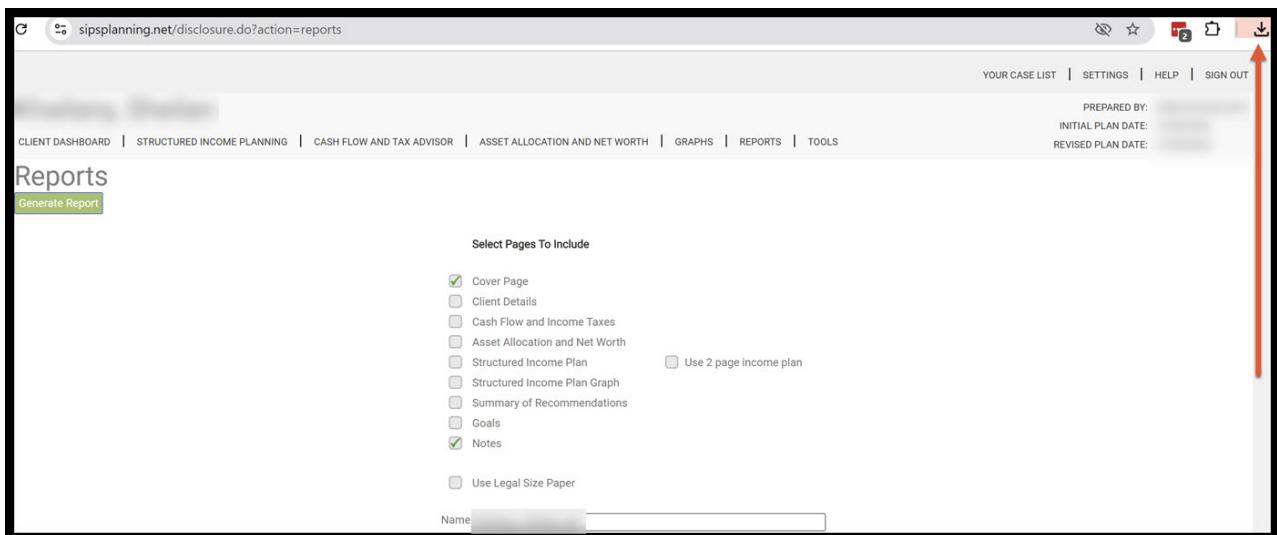
Select Pages To Include

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

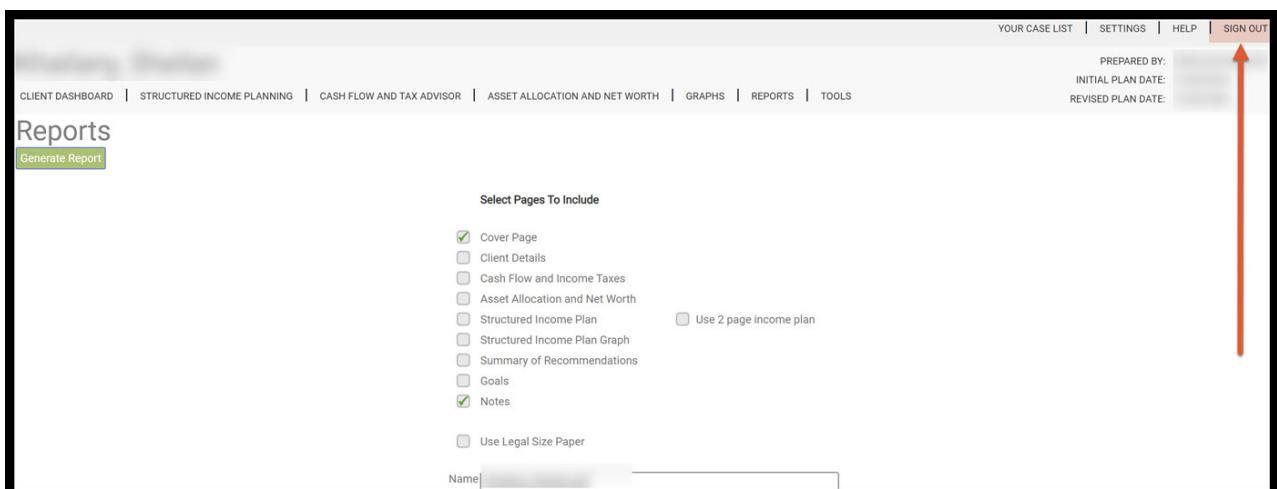
Use 2 page income plan  
 Use Legal Size Paper

Name

Step 14: Download: Open the pdf document that has been downloaded.



Step 15: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand 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: [support@planscout.com](mailto:support@planscout.com).