Creating Custom Text to the Disclosure Page and Final Report

12/06/2024 3:41 pm 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.

| | | YOUR CASE LIST | SETTINGS | HELP SIGN OUT |
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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.

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

| | YOUR CASE LIST SETTINGS HELP SIG |
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| Default Disclo | PREFERENCES RECOMMENDATIONS CUSTOM RETURN RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION O |
| Save | |
| | This page is the 'Cover page' and must be included with all presentations made to Preferred Client. |
| Standard Assumptions an | Disclaimer: |
| ASSUMPTIONS - This plan with respect to your incom growth potential. Our goal | is intended to provide an analysis of your financial position and potential income in retirement. This plan incorporates the information provided by you, the clien e, expenses, and asset holdings. Income plans can offer one or more of the following characteristics: lifetime guarantees, flexibility, principal preservation, and s to help you build a plan that takes these needs into account, given your preferences, goals and objectives. |
| The plan recommendation products being recommen | 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 led. This is a hypothetical example only and is not intended to predict the actual performance of any specific product. |
| The growth rates are hypo intestments have risks as | netical 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 ociated with them and future loss is possible. |
| CF ITERIA AND METHODO es imates, and detailed de can be brought together at see how these elements n de sired annual income tar | OGY - The income plan may contain investment accounts, annuities, life policies, income projections from sources like pensions and social security, income taz elopment 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 pu d structured to optimize income, minimize taxes, and provide more effective wealth transfer. The real power of the tool is creating scenarios which can be test ay be impacted under different conditions or using different planning concepts. The hypothetical variables include account growth, inflation, tax obligation, and et. Changing any of them will greatly impact the plan results. |
| For assets allocated to inv all o show income distribu illi strated income could re illi strative purposes only a | stment 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 ions 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 present a distribution of principal and/or interest depending on investment performance. The growth rates illustrated on this proposed income plan are for nd 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. |
| Fc ⁻ assets allocated to ins behefit base growth and n applicable) and may result recommendations must b | rance contracts, the contract and any guarantees therein are subject to the claims paying ability of the carrier. Annuity projected growth rates may show incom t the market value of the annuity. Annuity distributions may be subject to withdrawal charges, premium bonus recapture charges and market value adjustments in a loss of principal. Insurance company product recommendations must be accompanied by approved illustrations and/or brochures. Other investment accompanied by an approved prospectus. |
| If there are any insurance illustration disclosing all a All Income projections are noted. | roducts or annuities within the plan presentation, the National Association of Insurance Commissioners has specifically required that the consumer be given ar pects of how that product works and what the minimum guarantees are. This plan does not generate the required illustration and it must be furnished separate hypothetical and should not be considered indicative of actual income. The income portion of this analysis does not take into account any taxes unless otherwi |
| LIMITATIONS AND RISKS populate this report, includ information contained in t | 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 ng, 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 e plan is to be used for informational purposes only. |
| The income plan does not should be consulted prior or local tax penalties. Pote happen. Actual Social Sec information on your future | provide tax advice. The tax calculations and tax projections shown in this plan are approximate and not intended to be accurate. An appropriate tax professiona o implementation of any strategy. The information provided in the plan is not intended to be used, nor can it be used for the purpose of avoiding U.S. Federal, st tital Social Security Benefits shown in the plan are for informational purposes only. Potential Cost of Living increases are shown at a fixed rate. This is not likely rity Benefits may be impacted by a number of different factors related to your personal situation. You should refer to the Social Security Administration for penefit. We are not affiliated with the Social Security Administration or any other government agency. |
| Enter Additional Assumpti | n and Disclosure text: |
| This hypoth | tical report was created by first name, last name, credentials, company name, address, contact information. |
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Step 6: Your Case List: Click on Your Case List button located in the upper right hand side of the screen.

| | YOUR CASE LIST | SETTINGS | HELP | SIGN OUT |
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| Default Disclosure | PREFERENCES RECOMMENDATIONS CUSTOM RETURN RATES CUSTOM GROUPING PTIONS | DISCLOSURE | ALLOCA | TION CODES |
| 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 SE | ETTINGS HELP SIGN OUT |
|------------------|---------------------------------|---|-------------------|-----------------------|
| Your Cas | se List | | | |
| Add Case View Al | Il 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 SETTIN | IGS HELP | SIGN OUT |
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| Your Case List | | | | | |
| Tour ouse List | | | | | |
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| Search for Case | | | | | |
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| Case | Initial Plan Dute | Revised Date | Tags | Active | |
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Step 9: Disclosure: Click on the Disclosure button located in the upper right hand side of the screen.

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| Client Edit Goto In | Informa | tion | | | CLIE | INT INFORMATION INCO | DMES ASSETS | GOALS AND OBJECTIVES | RECOMMENDATION | S ADVISOR NOTES | DISCL | OSURE |
| Case Title Description | | | ••• | | | | | Selection tags | | | Activ | • 🖉 |
| Client one | Last | | First | client two | Last | | First | Initial plan date Revision date Address | | | | |
| | Current age | Retirement age | Gender Female V | | Current age | Retirement age | Client2 Gender Female V | City, State, Zip Email Phone Cell Phone Cell Phone | | | | |
| List Clients | Beneficiaries | (optional) | | | | | | | | | | |

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

| | | PREPARED BY: |
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| | | INITIAL PLAN DATE: |
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| Disclosure | CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJECTIVE | S RECOMMENDATIONS ADVISOR NOTES DISCLOSURE |
| im This | portant Note - the values shown in orange on various screens and reports indicate hypothet page is the 'Cover page' and must be included with all presentations made to Preferred Clie | ical values ent. |
| Assumptions and Disclaimer: | | |
| ASSUMPTIONS - This plan is intended to provide a with respect to your income, expenses, and asset growth potential. Our goal is to help you build a pla | n analysis of your financial position and potential income in retirement. This plan incorporal holdings. Income plans can offer one or more of the following characteristics: lifetime guara an that takes these needs into account, given your preferences, goals and objectives. | es the information provided by you, the client, intees, flexibility, principal preservation, and |
| The plan recommendations are based on your cur products being recommended. This is a hypothetic | rent situation, your resources, and your goals. In addition, they are based on our current expr al example only and is not intended to predict the actual performance of any specific produ | ectations of the behavior of the accounts and ict. |
| The growth rates are hypothetical and have been s investments have risks associated with them and | hown to continue unchanged for all years of the plan, but this is not likely to occur, and actu future loss is possible. | al results may be more or less favorable. All |
| CRITERIA AND METHODOLOGY - The income plan estimates, and detailed development of your retire can be brought together and structured to optimiz see how these elements may be impacted under or desired annual income target. Changing any of the | may contain investment accounts, annuities, life policies, income projections from sources ment annual income target. The objective is to give you and your advisor the ability to show e income, minimize taxes, and provide more effective wealth transfer. The real power of the ifferent conditions or using different planning concepts. The hypothetical variables include m will greatly impact the plan results. | like pensions and social security, income tax how these various pieces of a retirement puzzle tool is creating scenarios which can be tested to account growth, inflation, tax obligation, and the |
| For assets allocated to investment accounts, grow also show income distributions representing the a illustrated income could represent a distribution o illustrative purposes only and are not guaranteed. | th will be estimated using an average fixed rate which is hypothetical and not meant to indi mount of money to be withdrawn from the account. These income dollars may or may not b f principal and/or interest depending on investment performance. The growth rates illustrate These rates will change on a daily basis and also could be negative. Past performance is no | cate historical or future results. The plan may e guaranteed and are subject to change. This ed on this proposed income plan are for t an indication of future results. |
| For assets allocated to insurance contracts, the co benefit base growth and not the market value of t applicable) and may result in a loss of principal. Ir recommendations must be accompanied by an a | ntract and any guarantees therein are subject to the claims paying ability of the carrier. Ann e annuity. Annuity distributions may be subject to withdrawal charges, premium bonus reca surance company product recommendations must be accompanied by approved illustration proved prospectus. | uity projected growth rates may show income pture charges and market value adjustments (if is and/or brochures. Other investment |
| If there are any insurance products or annuities w illustration disclosing all aspects of how that proc All Income projections are hypothetical and shoul noted. | hin the plan presentation, the National Association of Insurance Commissioners has specif uct works and what the minimum guarantees are. This plan does not generate the required not be considered indicative of actual income. The income portion of this analysis does no | ically required that the consumer be given an Ilustration and it must be furnished separately. It take into account any taxes unless otherwise |
| LIMITATIONS AND RISKS - The information contai populate this report, including, but not limited to, a information contained in the plan is to be used for | ed in this report is not guaranteed to be accurate, complete, or timely. Neither your advisor y software or information provider, shall be liable for any damages or losses related to you informational purposes only. | nor anyone who helped your advisor create or r use of the information contained in it. The |
| The income plan does not provide tax advice. The should be consulted prior to implementation of an or local tax penalties. Potential Social Security Ben happen. Actual Social Security Benefits may be im information on your future benefit. We are not affil | ax calculations and tax projections shown in this plan are approximate and not intended to strategy. The information provided in the plan is not intended to be used, nor can it be use efits shown in the plan are for informational purposes only. Potential Cost of Living increas facted by a number of different factors related to your personal situation. You should refer facted with the Social Security Administration or any other government agency. | be accurate. An appropriate tax professional d for the purpose of avoiding U.S. Federal, state, es are shown at a fixed rate. This is not likely to to the Social Security Administration for |
| This hypothetical report was created by first name | , last name, credentials, company name, address, contact information. | |

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

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| Disclosure | CLIENT INFORMATION INCOMES ASSETS GOALS AND OBJEC | TIVES RECOMMENDATIONS ADVISOR NOTES DISCLOSURE |
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| | Important Note - the values shown in orange on various screens and reports indicate hypoth | netical values |
| | This page is the 'Cover page' and must be included with all presentations made to Preferred C | Client. |
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| Assumptions and Disclaimer: | | |
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Step 12: Notes Checkbox: Click on the Notes checkbox.

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| Reports | | | | | | | |
| Reports | | | | | | | |
| Generate Report | | | | | | | |
| | Select Pages To Include | | | | | | |
| | | | | | | | |
| \sim | 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 | | | | | | |
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Step 13: Generate Report: Click on the green Generate Report button underneath the Reports subheading.



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.

| | | | YOUR CASE LIST SETTINGS | HELP SI | GN OUT |
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| Reports Generate Report | | | | | Γ |
| | Select Pages To Include | | | | L |
| | Cover Page | | | | L |
| | 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 | | | | |
| N | 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.