Client Information

03/12/2026 3:23 pm EDT

After clicking on "Add a New Case," the next screen SIPS takes you to is the Client Information page. The screen is part of the Client Dashboard settings. Under the Client Dashboard settings are Client Information, Incomes, Assets, and Goals and Objectives. Client Information is where you enter all the demographic information about your client. Below is the hypothetical client we will use as an example:

Client Information:

- John Doe, age 58; birth date: 01/01/1968; retirement age: 67
- Jane Doe, age 54; birth date: 01/01/1972; retirement age: 67

Incomes:

- John Doe — Wages: $125,000 growing at 2.8%; Social Security (SS) at 67: $32,626 COLA at 2.8%; Pension at 67: $48,000 COLA at 2.8%
- Jane Doe — Wages: $250,000 growing at 2.8%; Social Security (SS) at 67: $36,000 COLA at 2.8%

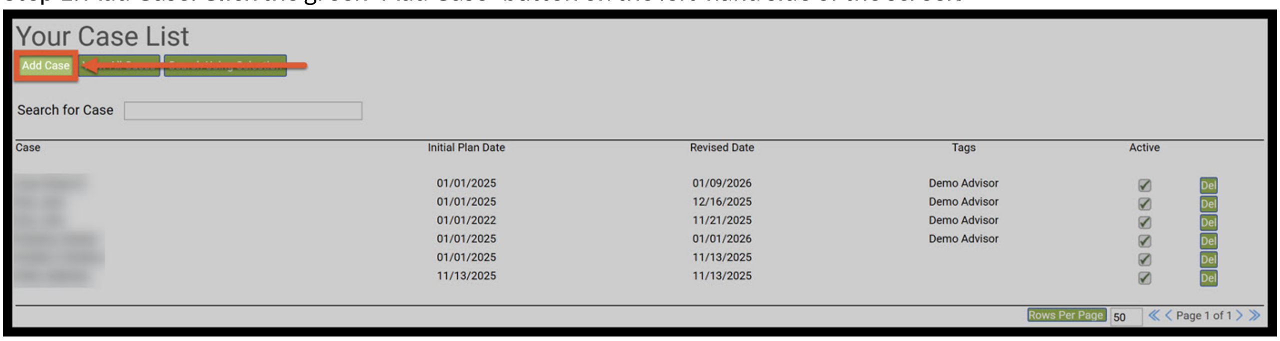
Assets:

- Taxable Joint Brokerage Account (BA): $2,000,000; Moderate, 3% net growth per year
- Tax-Deferred Individual IRA (John): $450,000; Conservative, 2% net growth per year
- Tax-Free Roth (Jane): $750,000; Conservative, 2% net growth per year
- Residential home: $750,000 in value, fully owned
- RV: $175,000 in value, fully owned

To learn more see articles:

- Client Information
- Incomes
- Assets
- Goals and Objectives
- Downloading the Report for Your Clients
- Case Studies

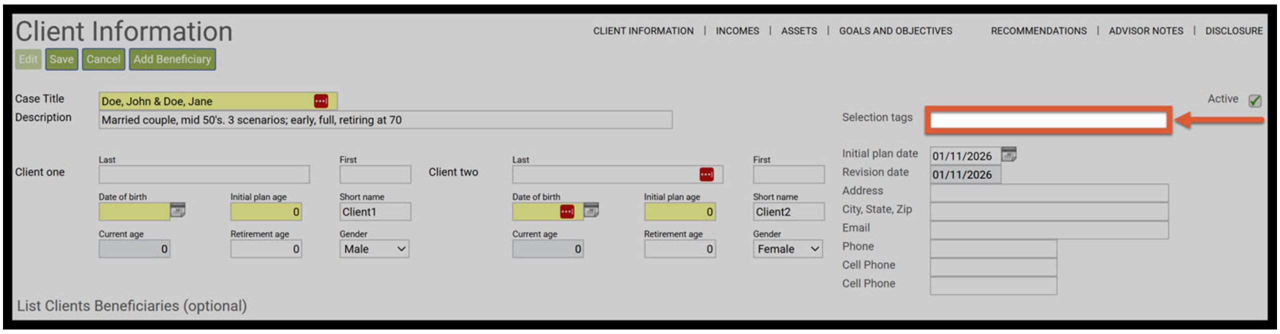
Step 1: Add Case: Click the green "Add Case" button on the left-hand side of the screen.



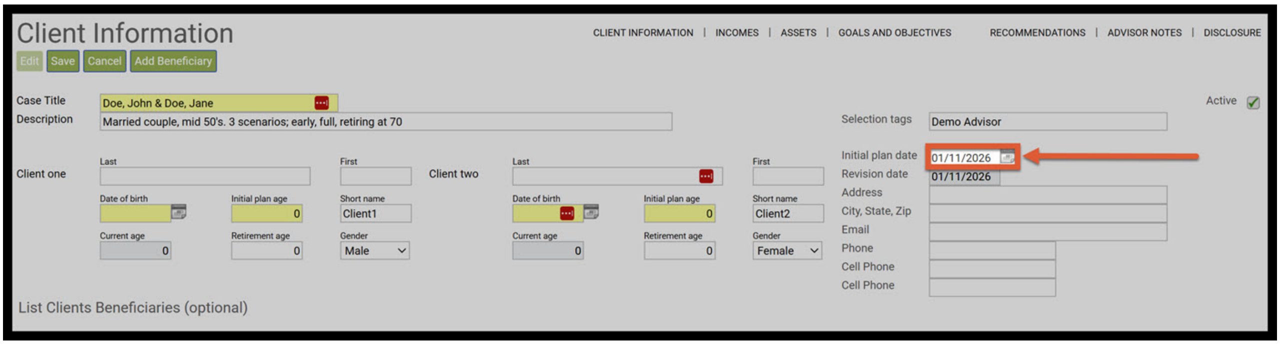
Step 2: Case Title: This text box is highlighted in yellow, which means it is mandatory and must be completed before you can move to the next screen. Use this field to name your case. When you view cases on the Case List page, this title is displayed.

Step 3: Description: This text box controls the description of text that appears in the report.

Step 4: Selection Tags: Use this text box to indicate case ownership in SIPS. When viewing all cases on the Your Case List page, the selected tags are displayed.

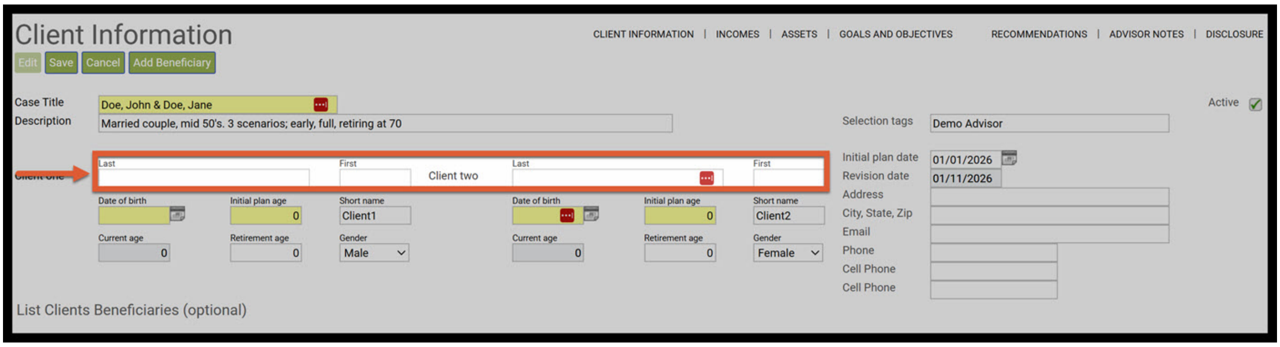


Step 5: Initial Plan Date: This text box is automatically populated with today's date when you create a case. To edit the Initial Plan Date, click the calendar icon and select the desired date. The Initial Plan Date is correlated with the client's birth year; each edit updates the client's age and is reflected in the initial plan. Because the Structured Income Plan is yearly, best practice is to use January 1 so annual calculations align correctly.



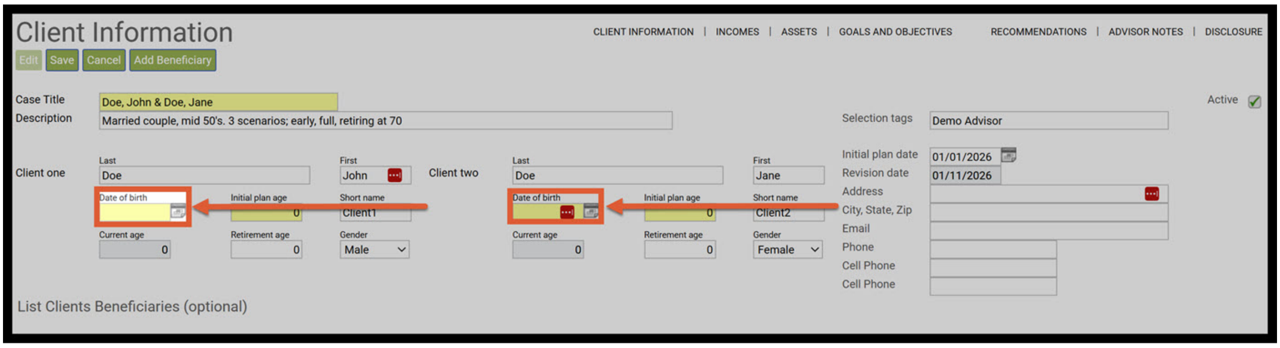
Step 6: Revision Date: The Revision Date is grayed out because it cannot be changed. It always reflects the date a SIPS user last edited the plan.

Step 7: Clients Name: Enter the client's last name and first name. If the case has only one person, use the Client One section to enter their name.

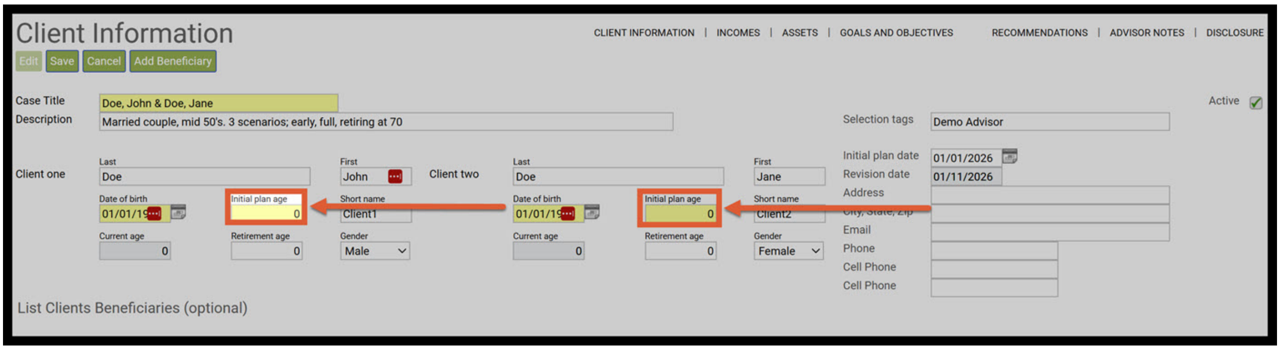


Step 8: Address: If you have the client's address, enter it here.

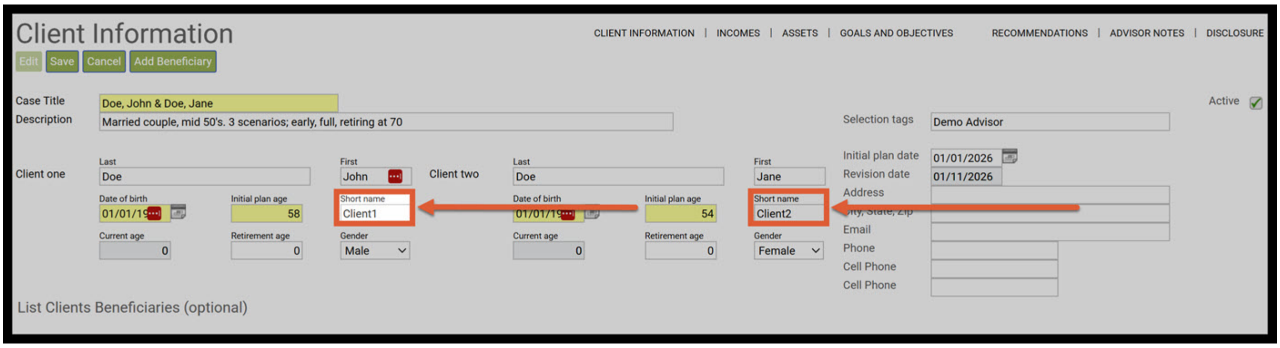
Step 9: Date of Birth: Enter the client's date of birth in the format MM/DD/YYYY.



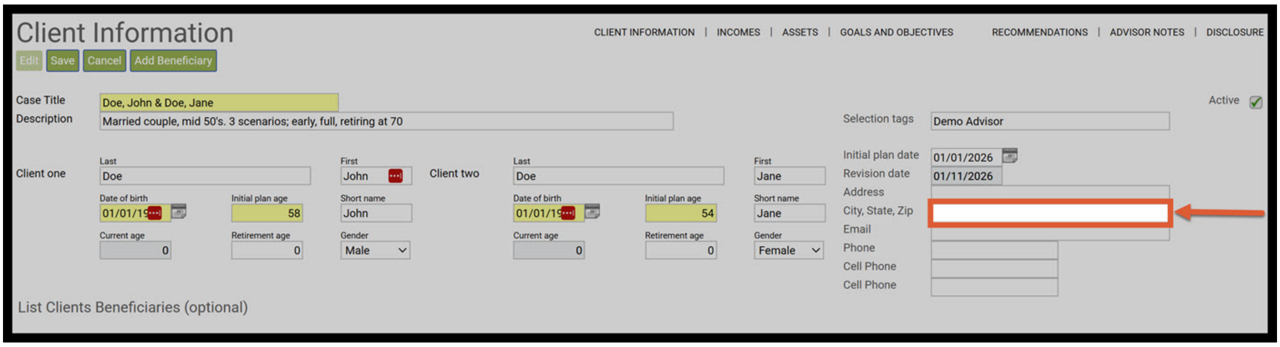
Step 10: Initial Plan Age: Enter in the initial plan age.



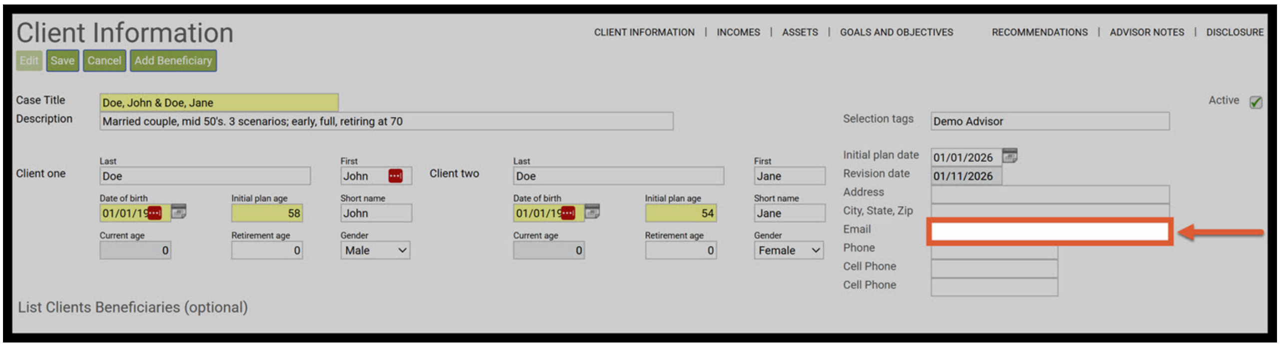
Step 11: Short Name: Enter the case's short name. This name will be displayed in the columns heading on the Structured Income Planning page.



Step 12: City, State, Zip: Enter the city, state, and ZIP code. The most important field is the state, SIPS uses it to apply the correct state tax rules.

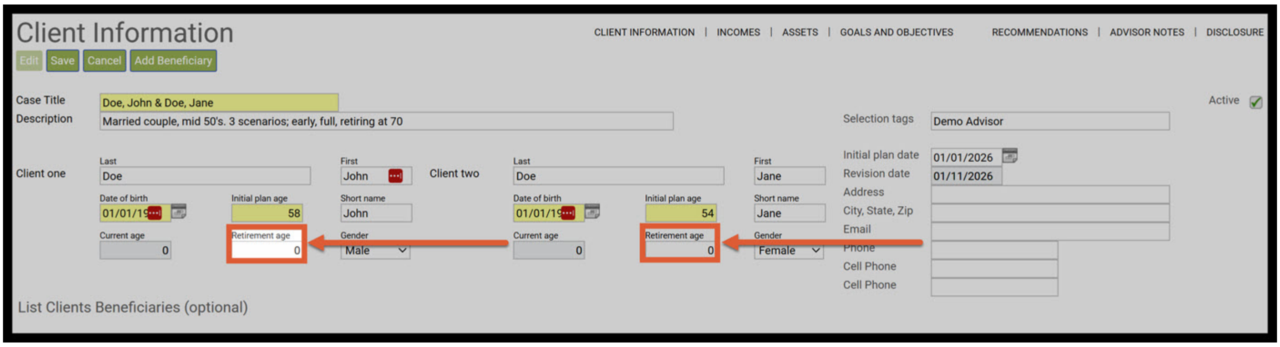


Step 13: Email: Enter the client's email address.

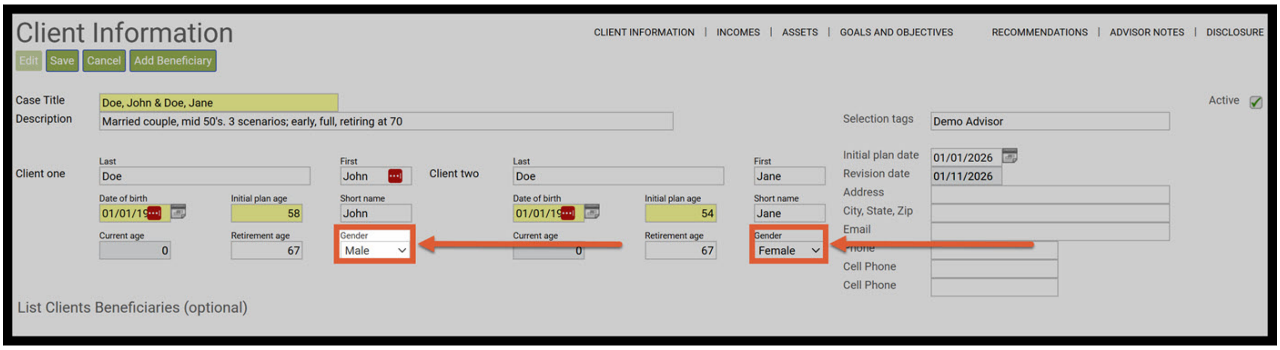


Step 14: Current Age: This field is grayed out because SIPS automatically calculates the current age after you click Save. To change the current age, edit the Date of Birth field. If you do not have the exact date of birth, you may either enter the known birth year and select January 1, and SIPS will estimate the age or enter the client's age without an exact birth date, and SIPS will estimate the birth date. Once you enter the date of birth, the current age field is populated after you save the data.

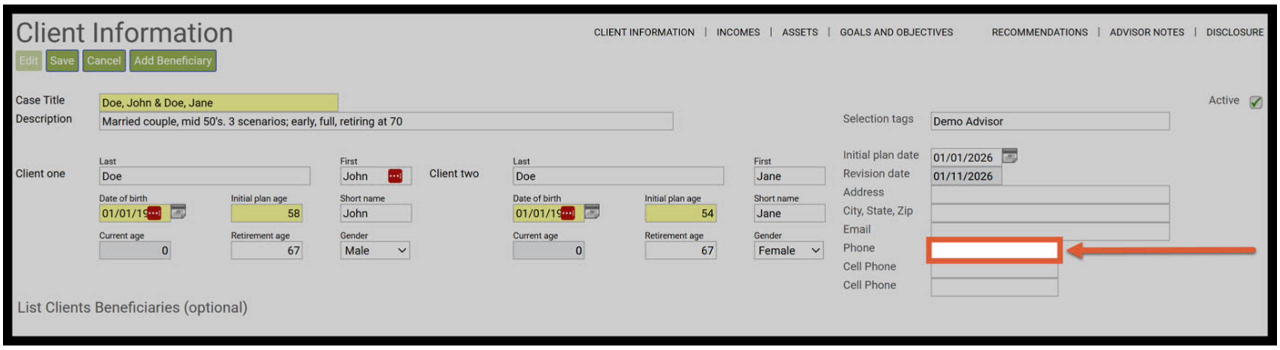
Step 15: Retirement Age: Enter the desired retirement age. This field determines when Social Security starts in the Structured Income Plan. If a retirement age is not entered, SIPS will not allow you to proceed to the Assets page.



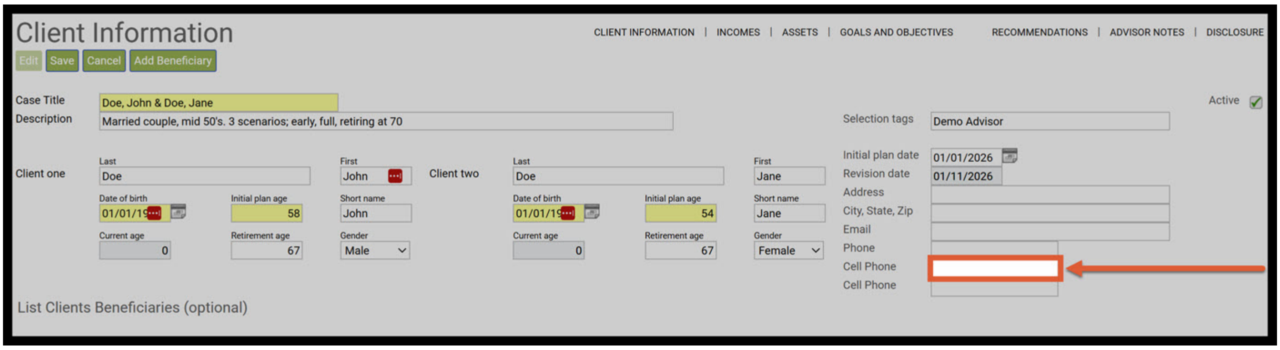
Step 16: Gender: Using the drop-down arrow, select the client's gender.



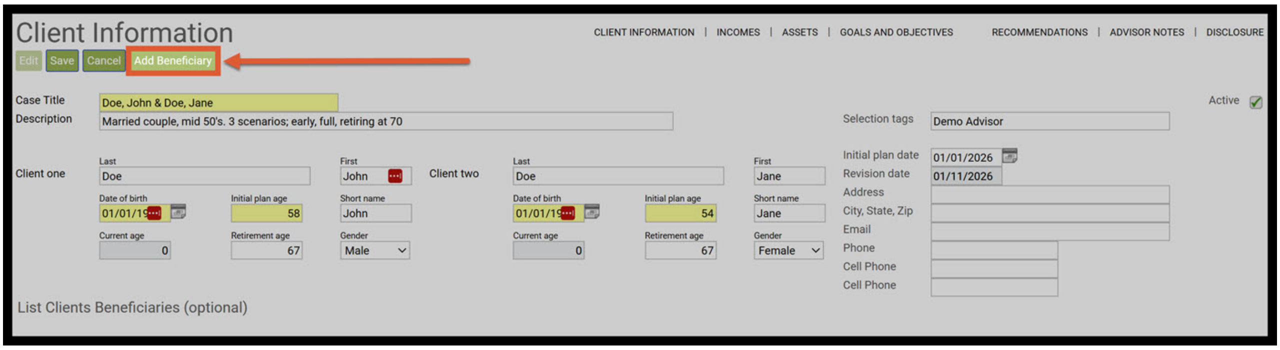
Step 17: Phone: Enter a phone number.



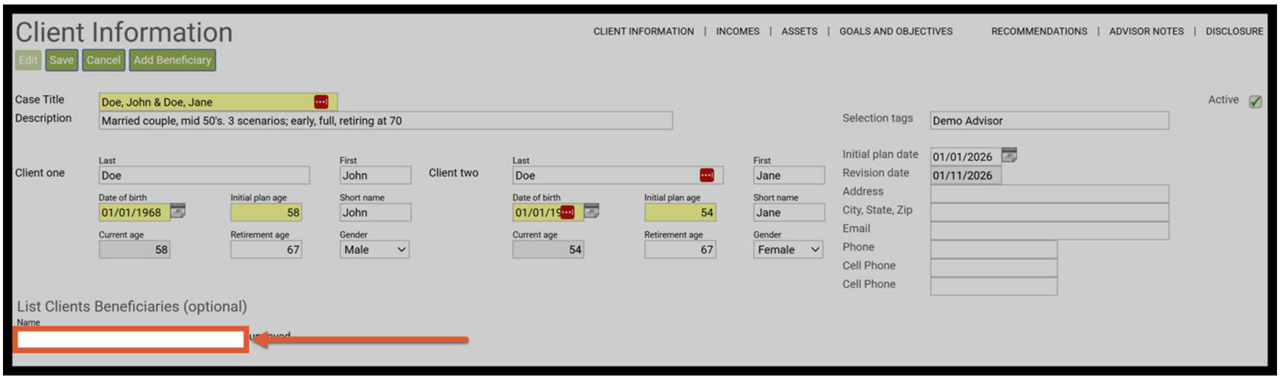
Step 18: Cell Phone: Enter a cell phone number.



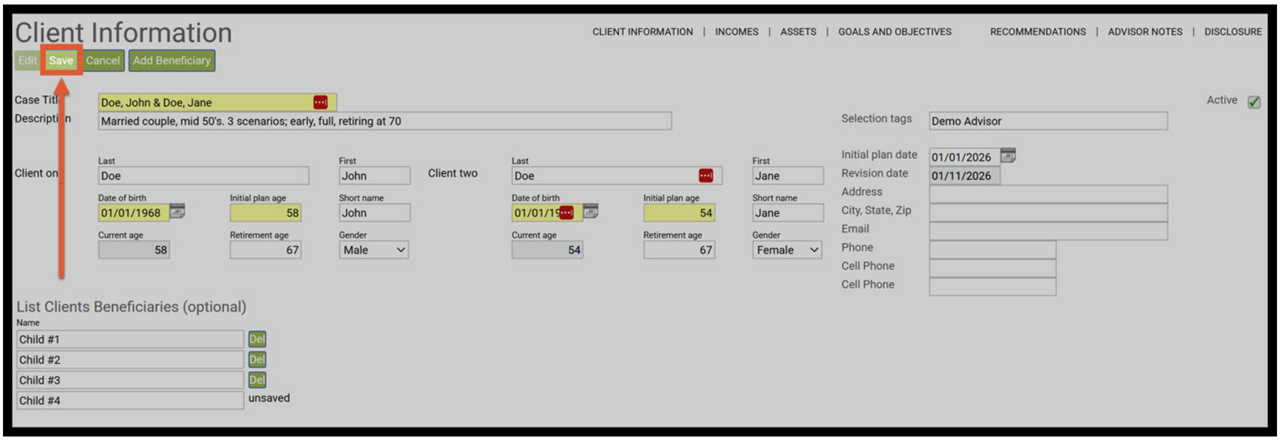
Step 19: Add Beneficiary: If the clients have beneficiaries, click the green Add Beneficiary button under the Client Information heading.



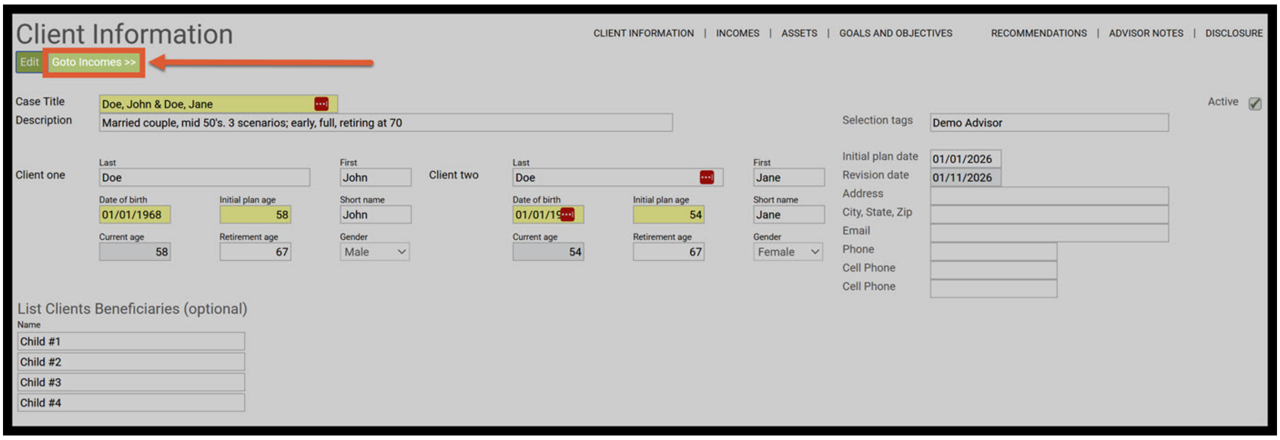
Step 20: Name: Click in the text box and enter the beneficiary's name.



Step 21: Save: Click on the green Save button underneath the Client Information heading.



Step 22: GoTo Incomes: Click on the Green GoTo Incomes underneath the Client Information heading.



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