

# 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

Case	Initial Plan Date	Revised Date	Tags	Active
	01/01/2025	01/09/2026	Demo Advisor	<input checked="" type="checkbox"/> Del
	01/01/2025	12/16/2025	Demo Advisor	<input checked="" type="checkbox"/> Del
	01/01/2022	11/21/2025	Demo Advisor	<input checked="" type="checkbox"/> Del
	01/01/2025	01/01/2026	Demo Advisor	<input checked="" type="checkbox"/> Del
	01/01/2025	11/13/2025	Demo Advisor	<input checked="" type="checkbox"/> Del
	11/13/2025	11/13/2025		<input checked="" type="checkbox"/> Del

Rows Per Page: 50 << Page 1 of 1 >>

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.

The screenshot shows the 'Client Information' form with the 'Case Title' field highlighted in yellow. The form includes fields for 'Client one' and 'Client two' with sub-fields for Last, First, Date of birth, Initial plan age, Current age, Retirement age, and Gender. There are also fields for 'Initial plan date' and 'Revision date' set to 01/11/2026, and a 'Selection tags' field. The 'Active' checkbox is checked.

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

The screenshot shows the 'Client Information' form with the 'Description' field highlighted in yellow. The 'Case Title' field now contains 'Doe, John & Doe, Jane'. The rest of the form structure is identical to the previous screenshot.

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.

The screenshot shows the 'Client Information' form with the 'Selection tags' field highlighted in yellow. The 'Description' field now contains 'Married couple, mid 50's. 3 scenarios; early, full, retiring at 70'. The 'Case Title' remains 'Doe, John & Doe, Jane'.

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.

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70

Selection tags: Demo Advisor

Active

Client one: Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name: Client1, Gender: Male

Client two: Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name: Client2, Gender: Female

Initial plan date: 01/11/2026  
 Revision date: 01/11/2026

List Clients Beneficiaries (optional)

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.

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70

Selection tags: Demo Advisor

Active

Client one: Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name: Client1, Gender: Male

Client two: Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name: Client2, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026

List Clients Beneficiaries (optional)

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.

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70

Selection tags: Demo Advisor

Active

Client one: Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name: Client1, Gender: Male

Client two: Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name: Client2, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026

List Clients Beneficiaries (optional)

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

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

Edit Save Cancel Add Beneficiary

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: Client1, Date of birth: [empty], Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Client2, Date of birth: [empty], Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: [empty]  
 City, State, Zip: [empty]  
 Email: [empty]  
 Phone: [empty]  
 Cell Phone: [empty]  
 Cell Phone: [empty]

List Clients Beneficiaries (optional)

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

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

Edit Save Cancel Add Beneficiary

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: Client1, Date of birth: 01/01/15, Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Client2, Date of birth: 01/01/15, Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: [empty]  
 City, State, Zip: [empty]  
 Email: [empty]  
 Phone: [empty]  
 Cell Phone: [empty]  
 Cell Phone: [empty]

List Clients Beneficiaries (optional)

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

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

Edit Save Cancel Add Beneficiary

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: Client1, Date of birth: 01/01/15, Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Client2, Date of birth: 01/01/15, Initial plan age: 0, Current age: 0, Retirement age: 0, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: [empty]  
 City, State, Zip: [empty]  
 Email: [empty]  
 Phone: [empty]  
 Cell Phone: [empty]  
 Cell Phone: [empty]

List Clients Beneficiaries (optional)

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.

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

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: Client1, Date of birth: 01/01/15, Initial plan age: 58, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Client2, Date of birth: 01/01/15, Initial plan age: 54, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_

List Clients Beneficiaries (optional)

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.

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

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/15, Initial plan age: 58, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/15, Initial plan age: 54, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_

List Clients Beneficiaries (optional)

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

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

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/15, Initial plan age: 58, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/15, Initial plan age: 54, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_

List Clients Beneficiaries (optional)

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.

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

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/15, Initial plan age: 58, Current age: 0, Retirement age: 0, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/15, Initial plan age: 54, Current age: 0, Retirement age: 0, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address:  
 City, State, Zip:  
 Email:  
 Phone:  
 Cell Phone:  
 Cell Phone:

List Clients Beneficiaries (optional)

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.

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

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/15, Initial plan age: 58, Current age: 0, Retirement age: 0, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/15, Initial plan age: 54, Current age: 0, Retirement age: 0, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address:  
 City, State, Zip:  
 Email:  
 Phone:  
 Cell Phone:  
 Cell Phone:

List Clients Beneficiaries (optional)

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

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

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/15, Initial plan age: 58, Current age: 0, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/15, Initial plan age: 54, Current age: 0, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address:  
 City, State, Zip:  
 Email:  
 Phone:  
 Cell Phone:  
 Cell Phone:

List Clients Beneficiaries (optional)

Step 17: Phone: Enter a phone number.

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/1958, Initial plan age: 58, Current age: 0, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/1954, Initial plan age: 54, Current age: 0, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_

List Clients Beneficiaries (optional)

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

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/1958, Initial plan age: 58, Current age: 0, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/1954, Initial plan age: 54, Current age: 0, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_

List Clients Beneficiaries (optional)

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

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

[Edit](#) [Save](#) [Cancel](#) [Add Beneficiary](#)

Case Title: Doe, John & Doe, Jane  
 Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70  
 Selection tags: Demo Advisor  
 Active

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/1958, Initial plan age: 58, Current age: 0, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/1954, Initial plan age: 54, Current age: 0, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026  
 Revision date: 01/11/2026  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_

List Clients Beneficiaries (optional)

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

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

Case Title: **Doe, John & Doe, Jane**  Active

Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70

Selection tags: **Demo Advisor**

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/1968, Initial plan age: 58, Current age: 58, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/1968, Initial plan age: 54, Current age: 54, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026, Revision date: 01/11/2026

List Clients Beneficiaries (optional): Name:

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

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

Case Title: **Doe, John & Doe, Jane**  Active

Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70

Selection tags: **Demo Advisor**

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/1968, Initial plan age: 58, Current age: 58, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/1968, Initial plan age: 54, Current age: 54, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026, Revision date: 01/11/2026

List Clients Beneficiaries (optional):

Child #1	<input type="button" value="Del"/>
Child #2	<input type="button" value="Del"/>
Child #3	<input type="button" value="Del"/>
Child #4	unsaved

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

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

Case Title: **Doe, John & Doe, Jane**  Active

Description: Married couple, mid 50's. 3 scenarios; early, full, retiring at 70

Selection tags: **Demo Advisor**

Client one: Last: Doe, First: John, Short name: John, Date of birth: 01/01/1968, Initial plan age: 58, Current age: 58, Retirement age: 67, Gender: Male

Client two: Last: Doe, First: Jane, Short name: Jane, Date of birth: 01/01/1968, Initial plan age: 54, Current age: 54, Retirement age: 67, Gender: Female

Initial plan date: 01/01/2026, Revision date: 01/11/2026

List Clients Beneficiaries (optional):

Child #1	
Child #2	
Child #3	
Child #4	

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)

