

# Adding A New Case

03/17/2026 2:13 pm EDT

This how-to guide outlines the essential steps for adding a new case. Before beginning, make sure you have all required client information, including demographic details (name and age) and financial data (income sources and asset values). Below is the hypothetical client we will use as an example:

## Client Information:

- John Doe, age 60; birth date: 01/01/1966; retirement age: 67

## Beneficiary:

- Child #1
- Child #2

## Incomes:

- Wages: \$150,000 growing at 2.8% per year; Social Security (SS) at 67: \$36,000 COLA at 2.8%; Pension at 67: \$48,000 COLA at 2.8%

## Assets:

- Taxable Brokerage Account (BA): \$2,000,000; Moderate, 3% net growth per year
- Tax-Deferred Individual IRA: \$1,000,000; Aggressive, 5% net growth per year
- Tax-Free Roth: \$500,000; Conservative, 2% net growth per year
- Residential Home: \$400,000 in value, fully owned

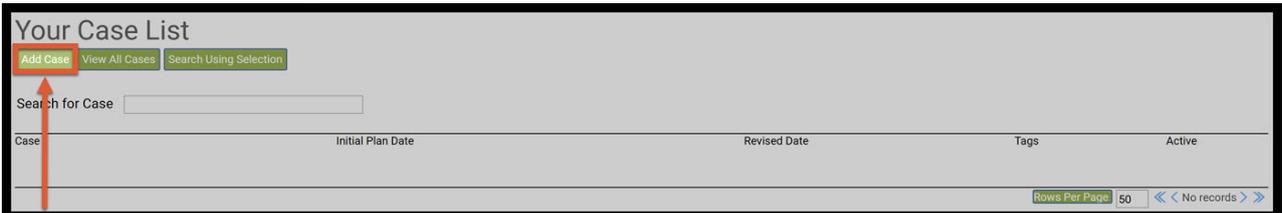
To learn more please see articles:

- [Client information](#)
- [Incomes](#)
- [Assets](#)
- [Getting Started Section](#)
- [Case Studies Section](#)

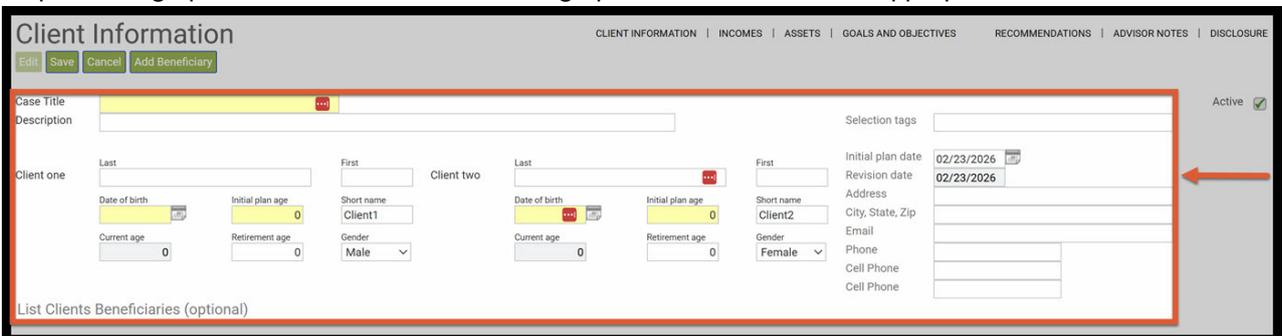
Step 1: Your Case List: Click on the green Goto Your Case List button or the Your Case List link in the heading to get you to the Your Case List Landing page.



Step 2: Add Case: Click the green Add Case button on the left-hand side of the screen.



Step 3: Demographic Information: Enter the demographic information into the appropriate text boxes.



Step 4: 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. At the top, there are navigation tabs: CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE. Below the heading, there are buttons: Edit, Save, Cancel, and Add Beneficiary. The 'Case Title' field contains 'Doe, John' and is highlighted with a red box. A red arrow points to this field. Other fields include Description, Selection tags, Active status, and client details for Client one and Client two. Client one's date of birth is 01/01/1966 and initial plan age is 60. Client two's date of birth is blank and initial plan age is 0. There is also a section for 'List Clients Beneficiaries (optional)' with fields for Child #1 and Child #2.

Step 5: Date of Birth and Initial Plan Age: These two fields are linked together. If no age is provided, the system displays the client's age as 0. If you select a year but not an age, the age field automatically updates once you click Save. If you enter an age without providing a birthdate, SIPS calculates the birth year and auto-fills the date of birth accordingly.

This screenshot is similar to the previous one, but with a red box around the 'Date of birth' and 'Initial plan age' fields for Client one. A red arrow points from the 'Date of birth' field to the 'Initial plan age' field, indicating their linkage. The 'Date of birth' field contains '01/01/1966' and the 'Initial plan age' field contains '60'. Other fields and the overall layout are the same as in the previous screenshot.

Step 6: Save: Click on the green Save button underneath the Client Information heading.

This screenshot shows the 'Client Information' form with the 'Save' button highlighted by a red box. A red arrow points to the 'Save' button. The form content is identical to the previous screenshots, showing the client details and the 'Save' button at the top left.

Step 7: 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

[Edit](#) [Goto Incomes >>](#)

Case Title:  Active

Description:

Selection tags:

Client one: Last:  First:  Client two: Last:  First:

Date of birth:  Initial plan age:  Short name:  Date of birth:  Initial plan age:  Short name:

Current age:  Retirement age:  Gender:  Current age:  Retirement age:  Gender:

Initial plan date:  Revision date:

Address:

City, State, Zip:

Email:

Phone:

Cell Phone:

Cell Phone:

List Clients Beneficiaries (optional)

Name:

Child #1:

Child #2:

Step 8: Edit: Click on the green Edit button below the Incomes heading.

### Incomes

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

[Edit](#) [Goto Assets >>](#)

Case Incomes

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %	<input type="text" value="0.0"/>	<input type="text"/>	Expected wage increase while working %	<input type="text" value="0.0"/>	<input type="text"/>

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	<input type="text"/>	Projected benefits	unknown	<input type="text"/>
	67	<input type="text"/>		70	<input type="text"/>
	70	<input type="text"/>			<input type="text"/>
OR Current benefit if already retired		<input type="text"/>	OR Current benefit if already retired		<input type="text"/>
Expected COLA increase %		<input type="text" value="0.0"/>	Expected COLA increase %		<input type="text" value="0.0"/>

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0	<input type="text"/>	Projected benefits	0	<input type="text"/>
OR Current benefit if already retired		<input type="text"/>	OR Current benefit if already retired		<input type="text"/>
Expected COLA increase %		<input type="text" value="0.0"/>	Expected COLA increase %		<input type="text" value="0.0"/>

Step 9: Monthly/Yearly Amounts Radio Button: Click on which radio button you would like to enter the data for, monthly or yearly. The default is set at yearly amounts.

### Incomes

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

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

Enter monthly amounts  Enter yearly amounts

Case Incomes

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
Expected wage increase while working %	<input type="text" value="0.0"/>	<input type="text"/>	Expected wage increase while working %	<input type="text" value="0.0"/>	<input type="text"/>

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62	<input type="text"/>	Projected benefits	unknown	<input type="text"/>
	67	<input type="text"/>		70	<input type="text"/>
	70	<input type="text"/>			<input type="text"/>
OR Current benefit if already retired		<input type="text"/>	OR Current benefit if already retired		<input type="text"/>
Expected COLA increase %		<input type="text" value="0.0"/>	Expected COLA increase %		<input type="text" value="0.0"/>

Pensions	At age	Yearly amount	Pensions	At age	Yearly amount
Projected benefits	0	<input type="text"/>	Projected benefits	0	<input type="text"/>
OR Current benefit if already retired		<input type="text"/>	OR Current benefit if already retired		<input type="text"/>
Expected COLA increase %		<input type="text" value="0.0"/>	Expected COLA increase %		<input type="text" value="0.0"/>

Step 10: Wages/Income: Enter in the Incomes Information.

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

Edit Save Cancel

Enter monthly amounts  Enter yearly amounts

Case Incomes

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	Expected wage increase while working %	0.0		Expected wage increase while working %	0.0

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	unknown	
	67			70	
	70				
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Pensions	Projected benefits	At age	Yearly amount	Pensions	Projected benefits	At age	Yearly amount
		0				0	
OR Current benefit if already retired				OR Current benefit if already retired			
Expected COLA increase %			0.0	Expected COLA increase %			0.0

Step 11: Social Security: If your client has not started collecting Social Security, enter a single value into the Projected Benefits column. Once you click Save, SIPS will automatically populate the remaining projected benefits. If your client is already collecting Social Security, enter the amount in the text box titled "Current Benefit". Enter the numerical value you would like to use for the COLA percentage.

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

Edit Save Cancel

Enter monthly amounts  Enter yearly amounts

Case Incomes

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	Expected wage increase while working %	150,000		Expected wage increase while working %	0.0
		2.8			

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	unknown	
	67			70	
	70				
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		0.0	Expected COLA increase %		0.0

Pensions	Projected benefits	At age	Yearly amount	Pensions	Projected benefits	At age	Yearly amount
		0				0	
OR Current benefit if already retired				OR Current benefit if already retired			
Expected COLA increase %			0.0	Expected COLA increase %			0.0

Step 12: Pensions: Enter in the Pensions information.

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

Edit Save Cancel

Enter monthly amounts  Enter yearly amounts

Case Incomes

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount
	Expected wage increase while working %	150,000		Expected wage increase while working %	0.0
		2.8			

Social security	At age	Yearly amount	Social security	At age	Yearly amount
Projected benefits	62		Projected benefits	unknown	
	67	36,000		70	
	70				
OR Current benefit if already retired			OR Current benefit if already retired		
Expected COLA increase %		2.8	Expected COLA increase %		0.0

Pensions	Projected benefits	At age	Yearly amount	Pensions	Projected benefits	At age	Yearly amount
		0				0	
OR Current benefit if already retired				OR Current benefit if already retired			
Expected COLA increase %			0.0	Expected COLA increase %			0.0

Step 13: Save: Click on the green Save button underneath the Incomes heading. If you need to edit any data, click on the green edit button under the Incomes heading.

The screenshot shows the 'Incomes' form with the 'Save' button highlighted in green and a red arrow pointing to it. The form includes sections for Case Incomes, Social Security, and Pensions. The 'Save' button is located at the top left, next to 'Edit' and 'Cancel' buttons.

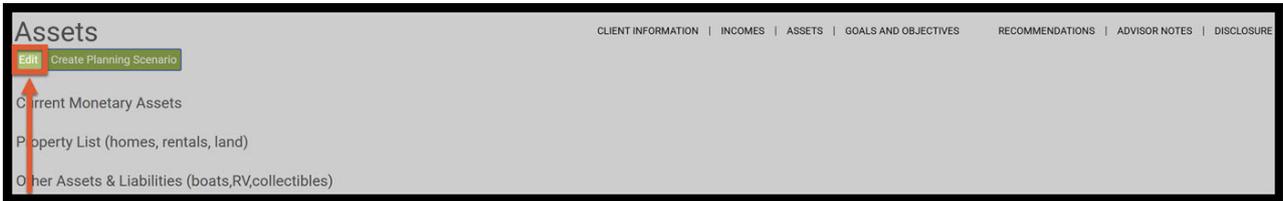
Step 14: Social Security: SIPS has automatically entered the remaining numbers.

The screenshot shows the 'Incomes' form with the Social Security section highlighted. A red box highlights the Social Security projected benefits for ages 62, 67, and 70, with values of \$25,200, \$36,000, and \$44,640 respectively. A red arrow points to the \$44,640 value. The form also shows Wages/Income and Pensions sections.

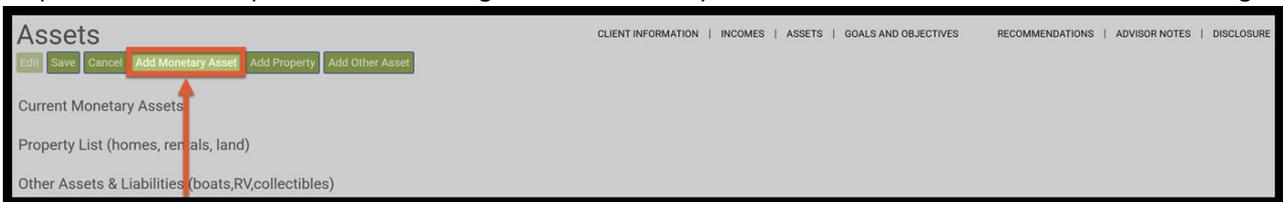
Step 15: Goto Asset: To continue to the Assets page click on the green GoTo Assets button underneath the Incomes heading.

The screenshot shows the 'Incomes' form with the 'GoTo Assets >>' button highlighted in green and a red arrow pointing to it. The form includes sections for Case Incomes, Social Security, and Pensions. The 'GoTo Assets >>' button is located at the top left, next to 'Edit' and 'Cancel' buttons.

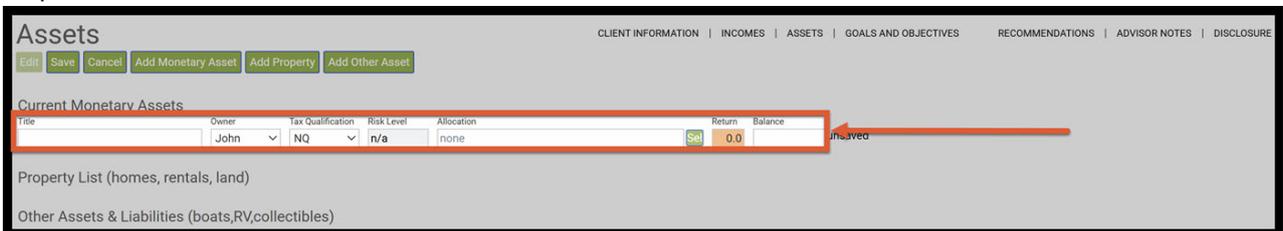
Step 16: Edit: Click on the green Edit button underneath the Assets subheading.



Step 17: Add Monetary Asset: Click on the green Add Monetary Asset button underneath the Assets subheading.



Step 18: Assets: Enter in the Assets Information.



Step 19: Save: Click on the green Save button underneath the Assets subheading.



Step 20: Create Planning Scenario: Click on the green Create Planning Scenario underneath the Assets subheading.

Step 21: Structured Income Planning Page: SIPS automatically created a structured income plan using the data entered on the previous pages.

Year	Taxable Brokerage Account (1)		Tax-Deferred Individual IRA (1)		Tax-Free Roth (1)		Accounts Total	Planned Distribution	John Wages (1)	John SS (1)	John Pension (1)	Total Income	Year
	Account	Income	Account	Income	Account	Income							
net return	60	3.00 %	5.00 %	John IRA	2.00 %								
initial amount		2,000,000	1,000,000		500,000		3,500,000						
bonus % w/bonus		0.00 %	0.00 %		0.00 %		0						
		2,000,000	1,000,000		500,000		3,500,000						
end of 1	60	2,060,000	0	1,050,000	0	3,620,000	0	150,000				150,000	end of 1
end of 2	61	2,121,800	0	1,102,500	0	3,744,500	0	154,200				154,200	end of 2
end of 3	62	2,185,454	0	1,157,625	0	3,873,683	0	158,518	25,200			183,718	end of 3
end of 4	63	2,251,018	0	1,215,506	0	4,007,740	0	162,956	25,906			188,862	end of 4
end of 5	64	2,318,548	0	1,276,282	0	4,146,870	0	167,519	26,631			194,150	end of 5
end of 6	65	2,388,104	0	1,340,096	0	4,291,281	0	172,209	27,377			199,586	end of 6
end of 7	66	2,459,747	0	1,407,100	0	4,441,190	0	177,031	28,143			205,174	end of 7
end of 8	67	2,533,540	0	1,477,455	0	4,596,824	0	181,988	28,931	48,000		258,919	end of 8
end of 9	68	2,609,546	0	1,551,328	0	4,758,420	0	187,084	29,741	49,344		266,169	end of 9
end of 10	69	2,687,832	0	1,628,894	0	4,926,223	0	192,322	30,574	50,726		273,622	end of 10
end of 11	70	2,768,467	0	1,710,339	0	5,100,493	0	197,707	31,430	52,146		281,283	end of 11
end of 12	71	2,851,521	0	1,795,856	0	5,281,498	0	203,243	32,310	53,606		289,159	end of 12
end of 13	72	2,937,066	0	1,885,649	0	5,469,518	0	208,934	33,215	55,107		297,256	end of 13
end of 14	73	3,025,178	0	1,979,931	0	5,664,848	0	214,784	34,145	56,650		305,579	end of 14
end of 15	74	3,115,934	0	2,078,928	0	5,867,795	0	220,798	35,101	58,236		314,135	end of 15
end of 16	75	3,209,412	0	2,182,874	0	6,078,678	0	226,980	36,084	59,867		322,931	end of 16
end of 17	76	3,305,694	0	2,292,017	0	6,297,852	0	233,336	37,094	61,543		331,973	end of 17
end of 18	77	3,404,864	0	2,406,618	0	6,525,606	0	239,869	38,133	63,266		341,268	end of 18
end of 19	78	3,507,010	0	2,526,949	0	6,762,364	0	246,585	39,200	65,038		350,823	end of 19
end of 20	79	3,612,220	0	2,653,296	0	7,008,490	0	253,490	40,298	66,859		360,647	end of 20
			0	0	0	0	0	3,949,552	579,512	740,388		5,269,452	

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).