

Changing the Order of the Recommendations on the Recommendations Page

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On the Recommendations page, you can change the order of the recommendations you have added to your client. This order carries over to the Summary of Recommendations page in the final report. In this how-to article, we will show you how to move the Income recommendation from the second position to the top of the list. We will start on a hypothetical Client Information landing page of an open case that already has recommendations added.

Related Articles: [Adding a Default Recommendation](#), [Recommendations](#)

Step 1: Recommendations: Click on the Recommendations subheading located on the right-hand side of your screen. *Related Articles:* [Accessing A Case](#)

The screenshot shows the 'Client Information' page. At the top, there is a navigation bar with tabs: CLIENT INFORMATION, INCOMES, ASSETS, GOALS AND OBJECTIVES, RECOMMENDATIONS, ADVISOR NOTES, and DISCLOSURE. The 'RECOMMENDATIONS' tab is highlighted with a red box, and a red arrow points to it. Below the navigation bar, the page is divided into sections for 'Client one' and 'Client two'. Each section contains fields for Last, First, Date of birth, Initial plan age, Current age, Retirement age, Short name, Gender, Address, City, State, Zip, Email, Phone, and Cell Phone. The 'Client one' section is filled with data for 'Doe, John', while the 'Client two' section is mostly empty.

Step 2: Edit: Click on the green Edit button underneath the Recommendations for Client's Name heading.

The screenshot shows the 'Recommendations for John' page. At the top, there is a navigation bar with tabs: CLIENT INFORMATION, INCOMES, ASSETS, GOALS AND OBJECTIVES, RECOMMENDATIONS, ADVISOR NOTES, and DISCLOSURE. The 'RECOMMENDATIONS' tab is highlighted. Below the navigation bar, the page is divided into sections for 'Title', 'Description', and 'Recommendations'. The 'Recommendations' section is highlighted with a red box, and a red arrow points to it. The 'Recommendations' section contains a list of recommendations: IRA Taxes, Income, Assets, Growth, and Taxes. Each recommendation has a description. The 'Income' recommendation is highlighted with a red box, and a red arrow points to it.

Step 3: Up Caret Arrow: Click on the up caret arrow to the left of the Income recommendation until it moves to the top of the list.

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

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

Title	Description	
IRA Taxes	With the current plan, your IRA will potentially cost you a large sum of money in taxes over the next several years. The Roth Optimizer indicates that rolling out of the IRA in the next few years will save you a big percentage of these taxes. We are recommending that you convert all of your assets and pay the taxes as shown in the Income Plan. Notice that even though you are paying a large amount to the IRS, your total net worth never dips below your current investment level.	Del
Income	Today your income comes from a collection of investments through interest and dividends. The problem with this approach is that interest rates and the potential for market returns varies dramatically year to year. Therefore your income will vary dramatically year to year. Our approach is to structure the income using laddered assets, dedicating specific accounts to generate income in specific years. Distributions are then consistent and higher risk is only associated with long term growth accounts.	Del
Assets	There is a concern that 60% of your assets are currently at risk. A market drop could put you in a position where your assets will no longer be able to support your current lifestyle. Our recommendation is to move some of your money to more conservative approaches to ensure that your future income streams are protected.	Del
Growth	A Managed Investment Account positioned to meet your risk tolerance provides the long term capability of keeping up with market rises and inflation. This account is designed to help maintain the overall portfolio value at the original investment level. You need to make sure that you agree with the assumed growth rates for this account as past investment results are not indicative of future returns. This account provides a significant emergency bucket of money to use as unforeseen financial issues arise.	Del
Taxes	From the Income Tax comparison we have determined that you are paying Taxes on all of your investment growth and most of your Social Security. The analysis indicates that by changing your investment approach, you will save a significant amount in Income Taxes. These savings can be considered income to you instead of payments to Uncle Sam. They are shown on the Structured Income Plan as Tax Savings.	Del

Step 4: Save: Click on the green Save button underneath the Recommendations for Client's Name heading.

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

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

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Step 5: Final Result: The Income recommendation now appears at the top of the list and will display first on the Summary of Recommendations page in the final report. *Related Articles:* [Generate Report Function](#)

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

[Edit](#)

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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.

