

Phased Drawdown - Adding Plans

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The plan name dropdown allows you to select a plan that has been previously input in the clients holding screen, alternatively you can input a new plan by choosing 'Add new plan' from the dropdown choices.

The screenshot shows a form with three main sections: 'Plan Name', 'Current Value', and 'Projected Value'. The 'Plan Name' section contains a dropdown menu with 'Select...' and a downward arrow. Below it are two buttons: 'Cancel' and 'Add'. The 'Current Value' section has a text input field with a pound sign (£). The 'Projected Value' section also has a text input field with a pound sign (£). The form has a light teal background.

You can add as many plans as you would like to take into the drawdown scenario. The projected total value of all plans is calculated.
