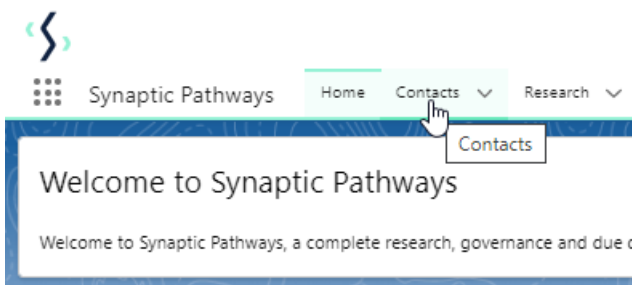
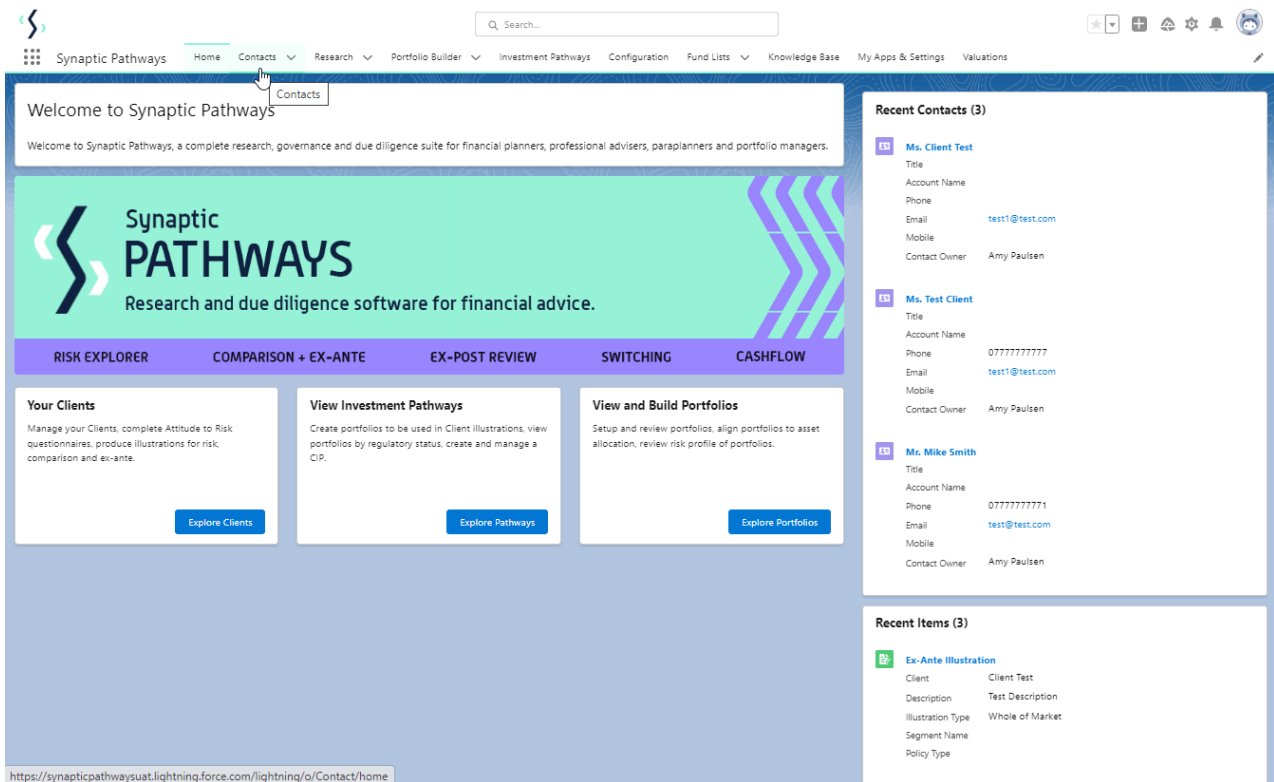


# Income Analysis - Creating Research

Last Modified on 06/10/2022 3:07 pm BST

Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:



Find your client in the list or search:



Contacts

### Recently Viewed Contacts

6 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

	<input type="checkbox"/> Name ↑	Account Name	Title
1	<input type="checkbox"/> Casey Sharon Cooper		
2	<input type="checkbox"/> Client Test		
3	<input type="checkbox"/> Jane D		
4	<input type="checkbox"/> Mike Smith		
5	<input type="checkbox"/> Test Client		
6	<input type="checkbox"/> Test Client1		

Scroll down to **Income Analysis**:



Search...

Contact

### Ms. Client Test

**Risk Illustrations (1)** New Change Owner

1 item • Updated a few seconds ago

	<input type="checkbox"/> Illustration Name	Description ...	Target Risk Category	Term	Review Date
1	<input type="checkbox"/> Risk Illustration		Balanced (High End)	10	

[View All](#)

**Research (1)** New Change Owner

1 item • Updated a few seconds ago

	<input type="checkbox"/> Illustration Name	Research Type	Description	Activity Due Date	Last Modified By	Convert To...
1	<input type="checkbox"/> Test Comparison Illustration	Comparison with Ex-ante	Test Description	31/07/2022	Amy Paulsen	

[View All](#)

**Income Analysis (0)** New Change Owner

**Opportunities (0)** New

**Cases (0)** New Change Owner

Complete **New Income Analysis** details:

### New Income Analysis

**Information**

\* Client Name

\* Goal Name

Description

\* Review Date

**Save**

### New Income Analysis

**Information**

\* Client Name

\* Goal Name

Description

\* Review Date

Click into the below link or into the newly created research:

✓ Income Analysis "[Income Analysis Research](#)" was created. ✕

**Income Analysis (1)**

1 item • Updated a few seconds ago

	Goal Name	Goal Type	Holdings	Fund Value	Income So...	Review Date
1	Income Analysis Research					14/08/2022

**Opportunities (0)**

**Income Analysis Research**

Client Name: Client Test      Description: Test Description

Created By: Amy Paulsen, 27/07/2022, 11:22

This will take you into the **Add Goal Details** screen:



**Income Analysis Research** New Contact Edit New Opportunity

Client Name: [Client Test](#) Description: [Test Description](#) Created By: [Amy Paulsen](#), 27/09/2022, 14:48

**Goal Details** Charges Plans Income Requirements Other Incomes Results Mark Status as Complete

**Add Goal Details**

**Drawdown Start**

Age:  Date:

\* Drawdown Start Age:

\* Forecast Life Expectancy:

**Growth Assumptions**

\* Annual Fund Growth Rate:

**Tax Rules**

Liable to Scottish Tax Rules?  Yes  No

**What's Shown Here**

These details will be used throughout the income analysis to provide a picture of how long the fund will last against a given income requirement.

For further information on Income Analysis research, see article [Income Analysis - Add Goal Details](#)