

# Income Analysis - Add Goal Details

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

This article is a continuation of [Income Analysis - Creating Research](#)

Complete the **Add Goal Details** screen. These details will be used throughout the research to provide a picture of how long the fund will last against a given income requirement:

The screenshot shows the 'Add Goal Details' screen within the 'Income Analysis Research' tool. The interface includes a navigation menu at the top with options like 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', 'Valuations', and 'Income Analysis Research'. Below the navigation, there's a search bar and a toolbar with icons for star, plus, trash, settings, and user profile. The main content area is titled 'Income Analysis Research' and shows a breadcrumb trail: 'Goal Details' > 'Charges' > 'Plans' > 'Income Requirements' > 'Other Incomes' > 'Results'. The 'Add Goal Details' section contains three main input areas: 'Drawdown Start' with 'Age' and 'Date' dropdowns, 'Drawdown Start Age' text input (placeholder: 'Enter Drawdown Start Age'), and 'Forecast Life Expectancy' text input (value: '85'); 'Growth Assumptions' with 'Annual Fund Growth Rate' text input (value: '0.00%'); and 'Tax Rules' with a 'Liable to Scottish Tax Rules?' toggle (options: 'Yes', 'No'). A 'What's Shown Here' box on the right explains that these details are used throughout the income analysis. At the bottom, there are three buttons: 'Cancel', 'Continue to Result Page', and 'Continue to Next Step'.

**Drawdown Start** – This information can be either an age or a date that you would like the drawdown plan to start.

**Forecast Life Expectancy** – This figure is pre calculated utilising ONS statistics, it is determined from the clients DOB and gender. If required this figure can be overridden.

**Annual Fund Growth Rate** - Assumed growth rate. This rate will be used to establish how long the pension fund will last over the given term.

**Scottish Tax Rules** – This option allows you to toggle whether the system uses Scottish Tax rules or not. This determines which tax bandings are applied within the calculations.

Once complete, **Continue to Next Step:**



### Income Analysis Research

New Contact Edit New Opportunity

Client Name: Client Text  
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
		67	85

**Growth Assumptions**

\* Annual Fund Growth Rate: 4.00%

**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 - Charges](#)