

Income Analysis - Income Requirements

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This article is a continuation of [Income Analysis - Add Plans](#)

The **Income Requirements** area allows you to enter level or profiled income requirements.

Level Income

Level Income is selected by default once you land on the **Income Requirements** page.

Enter an **Annual Income Amount** and **Continue to Next Step**

The screenshot shows the 'Income Analysis Research' interface. At the top, there is a navigation menu with options like 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. Below this is a search bar and utility icons. The main header area includes 'Income Analysis Research' and buttons for 'New Contact', 'Edit', and 'New Opportunity'. A progress bar shows four steps, with 'Income Requirements' being the current step. The 'Income Type' section has two tabs: 'Level Income' (selected) and 'Profiled Income'. Below this is the 'Net Level Income Requirements' section, which includes a text input field for 'Annual Income Amount £' containing '£30,000' and a note: 'This annual income is assumed to be payable monthly in advance on a level basis'. To the right, a 'What's Shown Here' box explains the two options: 'Modal a level annual withdrawal throughout the term by using the slider bar OR profile the withdrawals according to your client's specific needs - Everything can be adjusted at the results screen.' At the bottom, there are three buttons: 'Back', 'Continue to Result Page', and 'Continue to Next Step' (which is highlighted with a mouse cursor).

Profiled Income

Select **Profiled Income**:

This screenshot shows the same 'Income Requirements' page as above, but with the 'Profiled Income' tab selected. The 'Annual Income Amount £' field now contains '0'. A mouse cursor is pointing at the 'Profiled Income' tab. The rest of the interface, including the navigation menu, progress bar, and 'What's Shown Here' box, remains the same.

Regular and Single amounts can be added.

Regular

Click **+Add:**

Income Type
Level Income **Profiled Income**

Profiled Income Requirements
Start Age 67 Forecast Life Expectancy 85

Regular Income Amounts
+ Add

Single (One Off) Amounts
+ Add

Choose **Age** or **Date:**

Choose Start * Choose End *

Age Date

Complete remaining details:

Edit Regular Amount

Choose Start * Choose End *

Age Date Age Date

* Amount * Frequency * Frequency Type **Advanced** Arrears Indexation Indexation Rate %

Reason

Cancel **Save**

Income Type
Level Income **Profiled Income**

Profiled Income Requirements
Start Age 67 Forecast Life Expectancy 85

Regular Income Amounts
+ Add

Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type
67	72	£2,000.00	Monthly	Advanced

To edit any details, click into the drop down arrow to the right of the record and click **Edit:**

Profiled Income Requirements

Start Age: 67 Forecast Life Expectancy: 85

Regular Income Amounts

[+ Add](#)

Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	
67	72	£2,000.00	Monthly	Advanced	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
72	85	£3,000.00	Monthly	Advanced	

Save once done.

Single (One Off)

Click **+Add**:

Profiled Income Requirements

Start Age: 67 Forecast Life Expectancy: 85

Regular Income Amounts

[+ Add](#)

Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	
67	72	£2,000.00	Monthly	Advanced	<input type="button" value="v"/>
72	85	£3,000.00	Monthly	Advanced	<input type="button" value="v"/>

Single (One Off) Amounts

[+ Add](#)

Choose **Age** or **Date**:

Choose Start

Complete remaining details:

Add Single Amount

Choose Start

* Amount

Reason

Income Type

Level Income **Profiled Income**

Profiled Income Requirements

Start Age: 67 Forecast Life Expectancy: 85

Regular Income Amounts

+ Add

Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type
67	72	£2,000.00	Monthly	Advanced
72	85	£3,000.00	Monthly	Advanced

Single (One Off) Amounts

+ Add

Start Age/Date	Amount
70	£10,000.00

To edit any details, click into the drop down arrow to the right of the record and click **Edit**:

Profiled Income Requirements

Start Age: 67 Forecast Life Expectancy: 85

Regular Income Amounts

+ Add

Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type
67	72	£2,000.00	Monthly	Advanced
72	85	£3,000.00	Monthly	Advanced

Single (One Off) Amounts

+ Add

Start Age/Date	Amount
70	£10,000.00

Edit
Delete

Save once done.

For further information on Income Analysis research, see article [Income Analysis - Other Incomes](#)