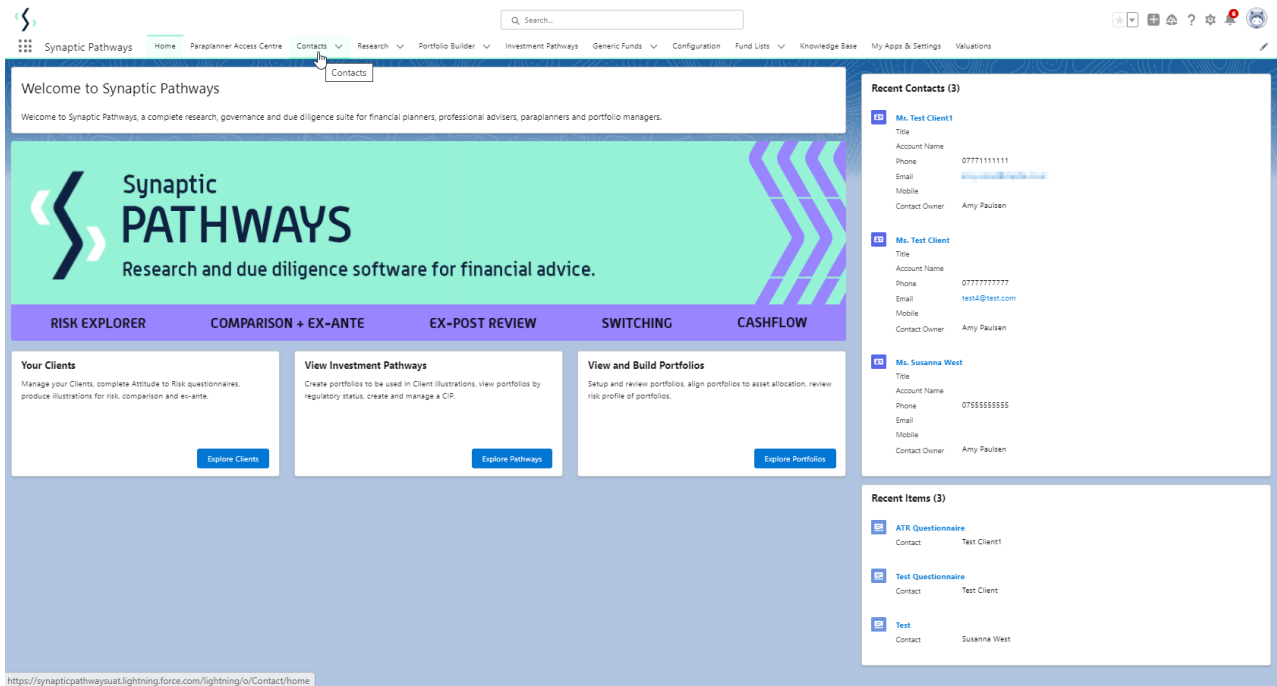


Income Analysis - Creating Research

Last Modified on 13/02/2024 3:35 pm GMT

Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:



https://synapticpathwaysuat.lightning.force.com/lightning/o/Contact/home



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

	Name ↑	Account Name
1	Ben Smith	
2	Mike Smith	
3	Steve Test	
4	Test Client	
5	test client account	test client account
6	Test Client1	

Scroll down to **Income Analysis** and click **New**:

Contact: Mr. Test Client1

Follow Edit New Contact New Opportunity

Related Details Medical Holdings Related Contacts Family ALUM

We found no potential duplicates of this Contact.

Client Questionnaires (1)

Client Questionnaire Name	Completed...	Risk Category	Risk Rating	Default ↑
ATR Questionnaire	No	Moderately Cautious (High End)	4	

Risk Illustrations (1)

Illustration Name	Description...	Target Risk Category	Term	Review Date
Risk Illustration		Moderately Cautious (High End)	10	

Research (0) [New](#)

Income Analysis (0) [New](#)

Protection (0) [New](#)

Opportunities (0) [New](#)

Cases (0) [New](#)

Recent Items (3)

- [ATR Questionnaire](#) Contact: Test Client1
- [Test Questionnaire](#) Contact: Test Client
- [Test](#) Contact: Susanna West

Activity Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Complete **New Income Analysis** details:

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

Description
Test Description

* Review Date
19/10/2024

Calendar: October 2024. Date 19 is selected.

Buttons: Save & New, Save

Save

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

Description
Test Description

* Review Date
19/10/2024

Buttons: Cancel, Save & New, Save

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	Type	Holdings	Fund Value	Income So...	Review Date
<input type="checkbox"/> Income Analysis Research					19/10/2024

Income Analysis Research

Client Name: [Test Client1](#)

Description: [Test Description](#)

Created By: [Amy Paulsen](#), 05/10/2023, 10:54

[View All](#)

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

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations **Income Analysis Research**

Income Analysis Research [Comparison with Ex-Ante](#) [Edit](#) [Delete](#)

Client Name: [Test Client1](#) Description: [Test Description](#) Created By: [Amy Paulsen](#), 05/10/2023, 10:54

Goal Details Charges Plans Income Requirements Other Incomes Annuity 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.

[Cancel](#) [Continue to Result Page](#) [Continue to Next Step](#)

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