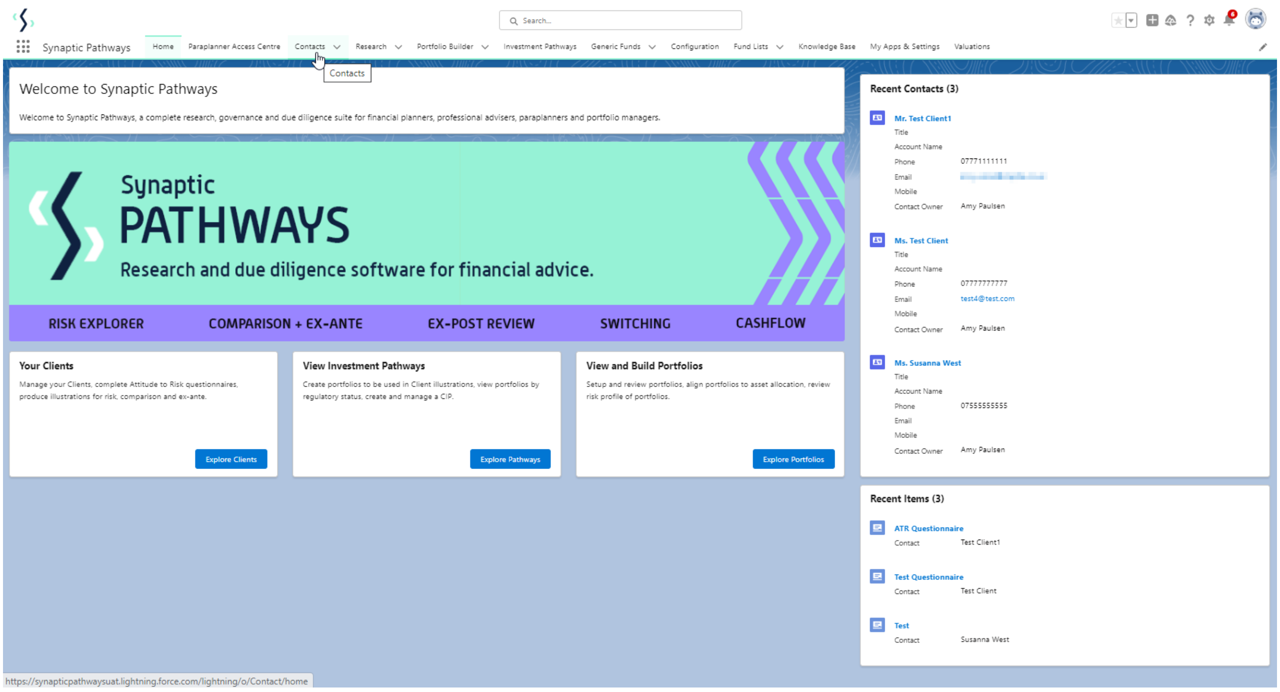
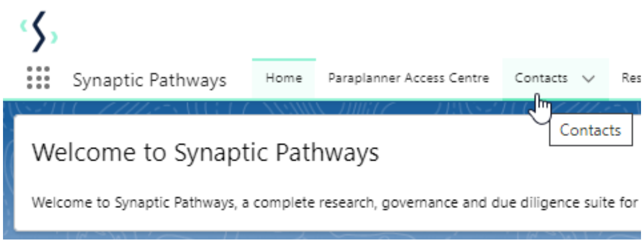
Income Analysis - Creating Research

20/02/2025 1:52 pm GMT

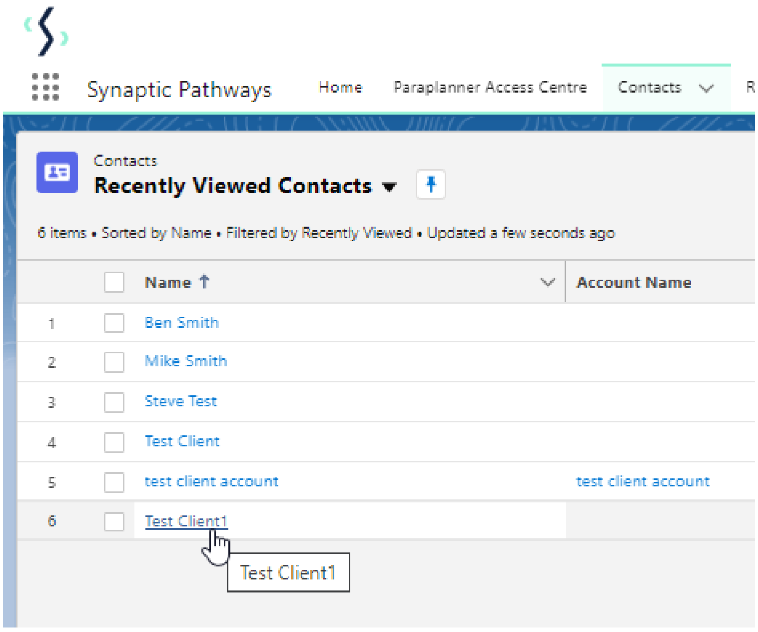
Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:

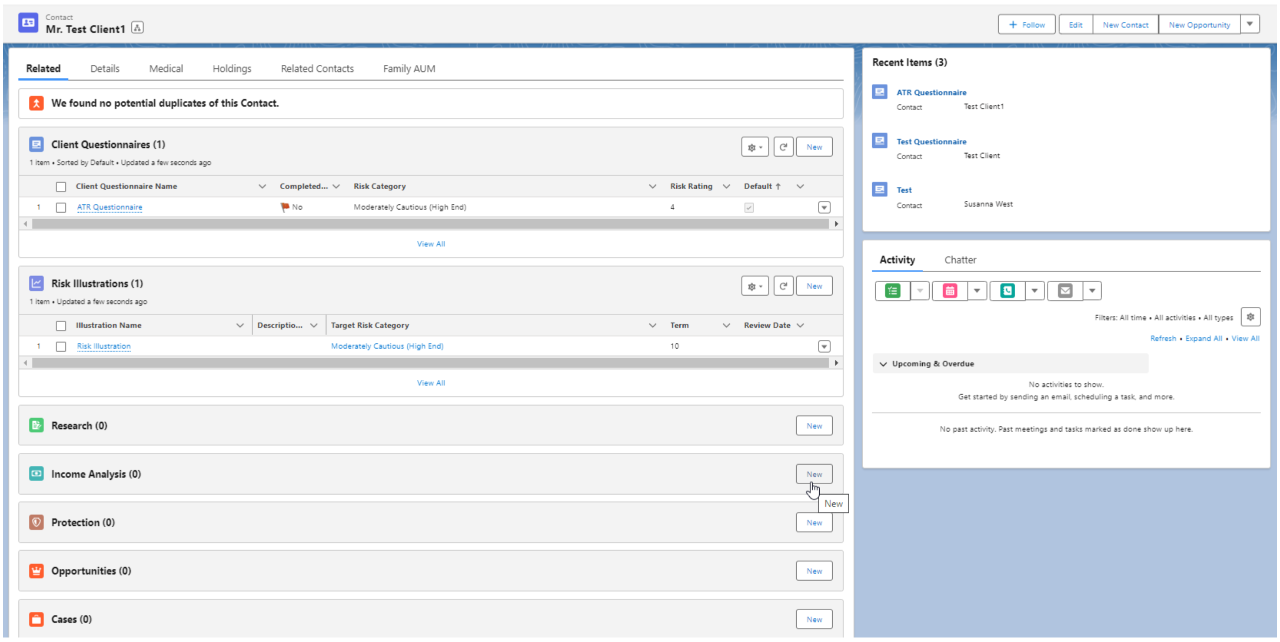




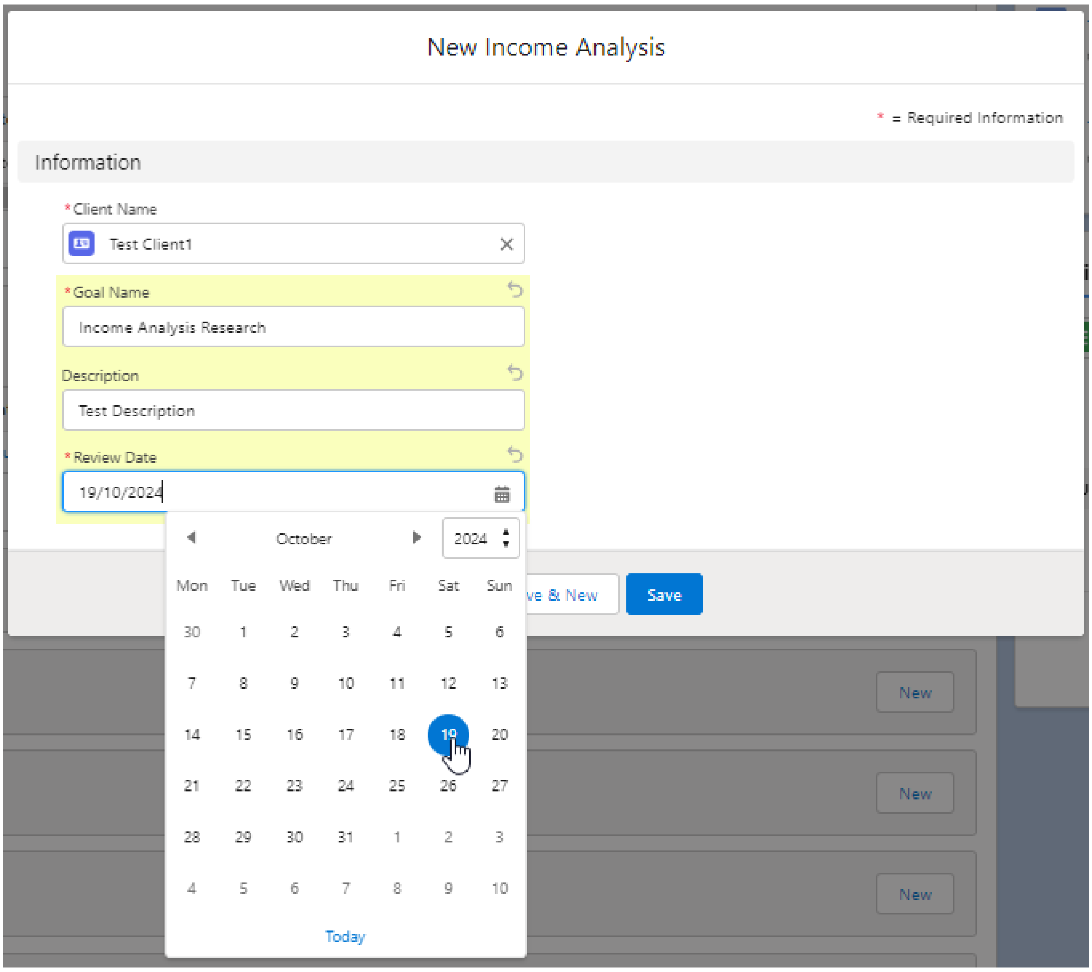
Find your client in the list or search:



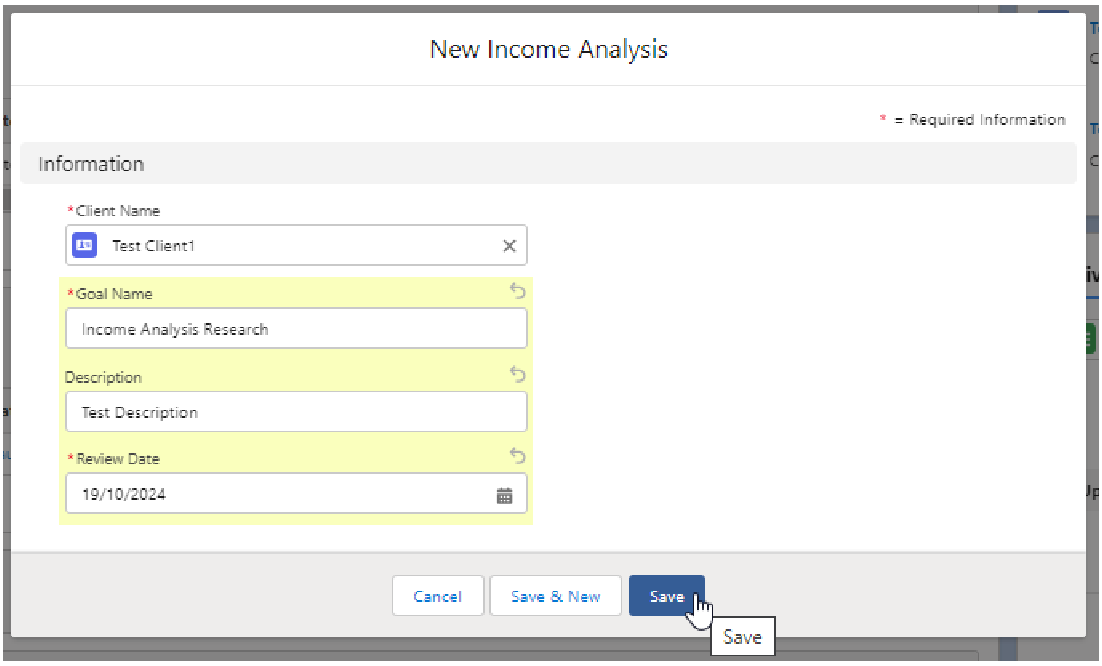
Scroll down to **Income Analysis** and click **New:**



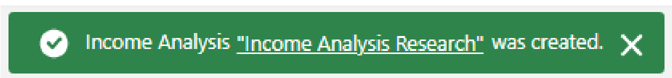
Complete **New Income Analysis** details:

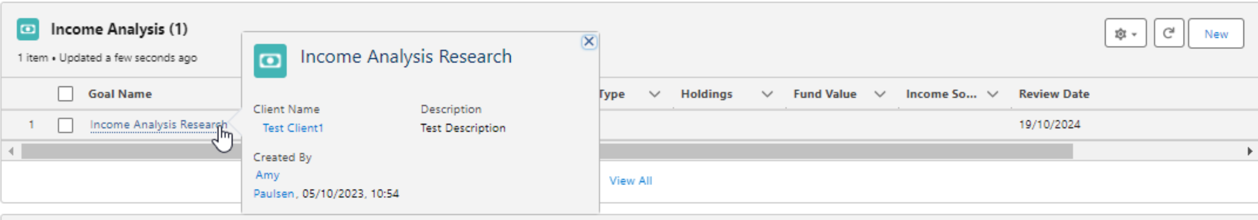


Save

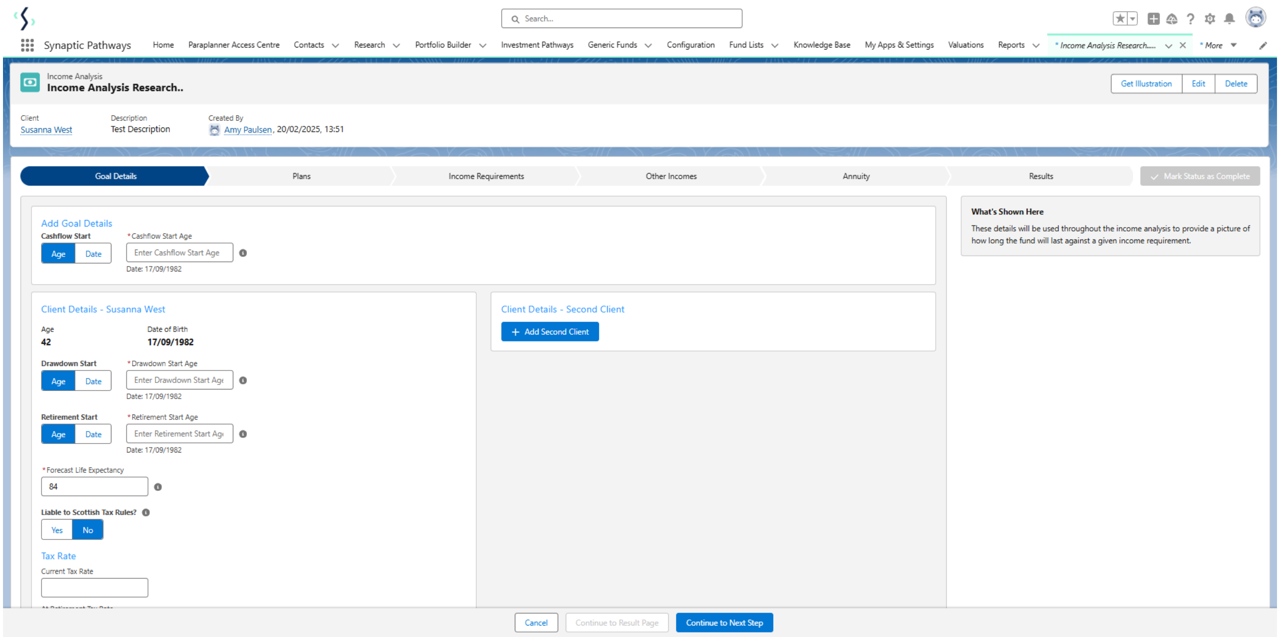


Click into the below link or into the newly created research:





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



For further information on Income Analysis research, see article Income Analysis - Add Goal Details

If you would like to complete joint life research, see article Income Analysis - Joint Life - Create Research