

# Income Analysis - Creating Research

15/04/2025 4:10 pm BST

Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:

The screenshot shows the Synaptic Pathways dashboard. The top navigation bar includes the Synaptic Pathways logo, a search bar, and a menu with the following items: Synaptic Pathways, Home, Paraplanner Access Centre, **Contacts** (highlighted with a dropdown arrow), Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main content area is titled "Welcome to Synaptic Pathways" and features a large banner with the Synaptic Pathways logo and the text "Research and due diligence software for financial advice." Below the banner are five tabs: RISK EXPLORER, COMPARISON + EX-ANTE, EX-POST REVIEW, SWITCHING, and CASHFLOW. The main content area is divided into three sections: "Your Clients" (Manage your Clients, complete Attitude to Risk questionnaires, produce Illustrations for risk, comparison and ex-ante), "View Investment Pathways" (Create portfolios to be used in Client Illustrations, view portfolios by regulatory status, create and manage a CP), and "View and Build Portfolios" (Setup and review portfolios, align portfolios to asset allocation, review risk profile of portfolios). On the right side, there are two panels: "Recent Contacts (3)" and "Recent Items (3)". The "Recent Contacts (3)" panel lists three contacts: Mr. Test Client1, Ms. Test Client, and Ms. Susanna West. The "Recent Items (3)" panel lists three items: ATR Questionnaire, Test Questionnaire, and Test.

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

This close-up screenshot focuses on the navigation bar of the Synaptic Pathways application. It shows the logo on the left, followed by the text "Synaptic Pathways". To the right of the logo are several tabs: Home, Paraplanner Access Centre, **Contacts** (which has a dropdown arrow and a tooltip that says "Contacts"), and Res. A mouse cursor is pointing at the "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
1	<input type="checkbox"/> Ben Smith	
2	<input type="checkbox"/> Mike Smith	
3	<input type="checkbox"/> Steve Test	
4	<input type="checkbox"/> Test Client	
5	<input type="checkbox"/> test client account	test client account
6	<input type="checkbox"/> Test Client1	

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)

1 item • Sorted by Default • Updated a few seconds ago

☐

Client Questionnaire Name

Completed...

Risk Category

Risk Rating

Default ↑

1

[ATR Questionnaire](#)

No

Moderately Cautious (High End)

4

☒

View All

Risk Illustrations (1)

1 item • Updated a few seconds ago

☐

Illustration Name

Description...

Target Risk Category

Term

Review Date

1

[Risk Illustration](#)

Moderately Cautious (High End)

10

View All

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

Filter: All time • All activities • All types

Refresh • Expand All • View All

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 and **Save**

## New Income Analysis

\* = Required Information

### Information

\* Client

\* Goal Name

Description

\* Review Date

\* Accumulation / Decumulation

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

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

Income Analysis (1)		Income Analysis Research			
1 Item • Updated a few seconds ago		Client Name		Type	
		Test Client1		Holdings	
		Description		Fund Value	
		Test Description		Income So...	
		Created By		Review Date	
		Amy Paulsen, 05/10/2023, 10:54		19/10/2024	
				View All	

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

Synaptic Pathways

HomeParaplanner Access CentreContactsResearchPortfolio BuilderInvestment PathwaysGeneric FundsConfigurationFund ListsKnowledge BaseMy Apps & SettingsValuationsReportsIncome Analysis ResearchMore

Search...

Income Analysis

Income Analysis Research..

Get IllustrationEditDelete

ClientSusanna WestDescriptionTest DescriptionCreated ByAmy Paulsen, 20/02/2023, 13:51

Goal DetailsPlansIncome RequirementsOther IncomesAnnuityResultsMark Status as Complete

Add Goal Details

Cashflow Start

AgeDate

Enter Cashflow Start Age

Date: 17/08/1982

Client Details - Susanna West

AgeDate of Birth

4217/09/1982

Drawdown Start

AgeDate

Enter Drawdown Start Age

Date: 17/08/1982

Retirement Start

AgeDate

Enter Retirement Start Age

Date: 17/08/1982

Forecast Life Expectancy

84

Liable to Scottish Tax Rules?

YesNo

Tax Rate

Current Tax Rate

Client Details - Second Client

+ Add Second Client

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.

CancelContinue to Result PageContinue to Next Step

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](#)