

# Income Analysis - Add Goal Details

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

If you are looking to complete joint life research, see article [Income Analysis - Joint Life - Create 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 displays the 'Add Goal Details' interface. At the top, there's a search bar and navigation links. Below, the 'Add Goal Details' section is active, showing input fields for 'Drawdown Start' (Age: 67, Date: [empty]), 'Annual Fund Growth Rate' (7.74%), 'Client Details - Susanna West' (Forecast Life Expectancy: 84, Liable to Scottish Tax Rules: Yes), and 'Tax Rate' (Current Tax Rate, At Retirement Tax Rate). A 'What's Shown Here' box on the right explains that these details are used for income analysis. At the bottom, there are buttons for '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. If you have completed an Attitude to Risk Questionnaire for you client and have set it active, this will pre-populate based on your client's risk rating.

**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.

**Tax Rate** - Capture the client's Current Tax Rate and At Retirement Tax Rate

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

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Income Analysis  
**Income Analysis Research** Get Illustration Edit Delete

Client: Susanna West Description: Test Description Created By: Amy Paulsen, 01/10/2024, 12:54

Goal Details Charges Plans Income Requirements Other Incomes Annuity Results Mark Status as Complete

**Add Goal Details**  
Drawdown Start: Age: [67] Date: [ ] \*Drawdown Start Age: [67] \*Annual Fund Growth Rate: [7.74%]

**Client Details - Susanna West**  
\*Forecast Life Expectancy: [84]  
Liable to Scottish Tax Rules?: [Yes] [No]  
Tax Rate  
Current Tax Rate: [20.00%]  
At Retirement Tax Rate: [20.00%]

**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.

Cancel Continue to Result Page **Continue to Next Step**

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