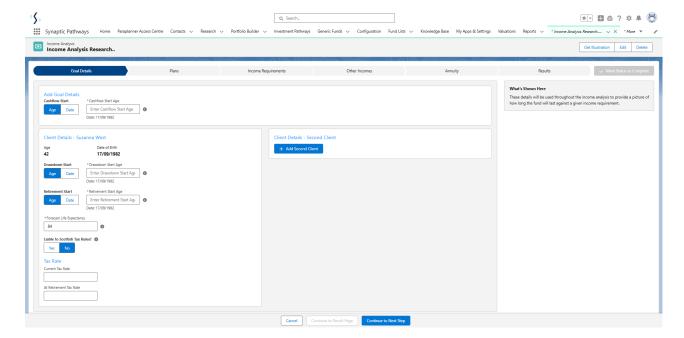
Income Analysis - Add Goal Details

27/02/2025 11:30 am GMT

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:



Cashflow Start Age – This information can be either an age or a date that you would like the drawdown scenario to start.

Drawdown Start Age - Age/Date the client goes into Drawdown. This will default to the Cashflow start age for Client 1. If doing joint research, you can set an age/date they go into drawdown.

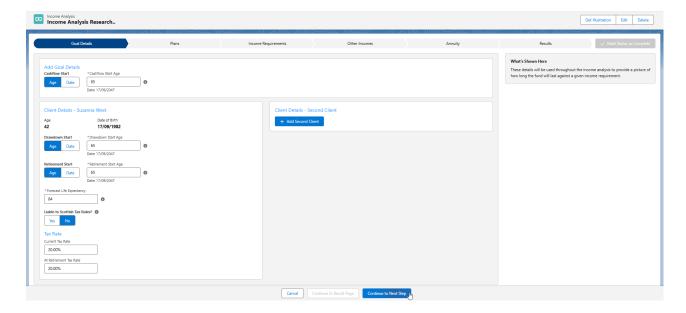
Retirement Start Age - Age/Date the client starts Retirement. This field is not used in calculations, but will appear on the report.

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.

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:



For further information on Income Analysis research, see article Income Analysis - Plans