Income Analysis - Add Goal Details

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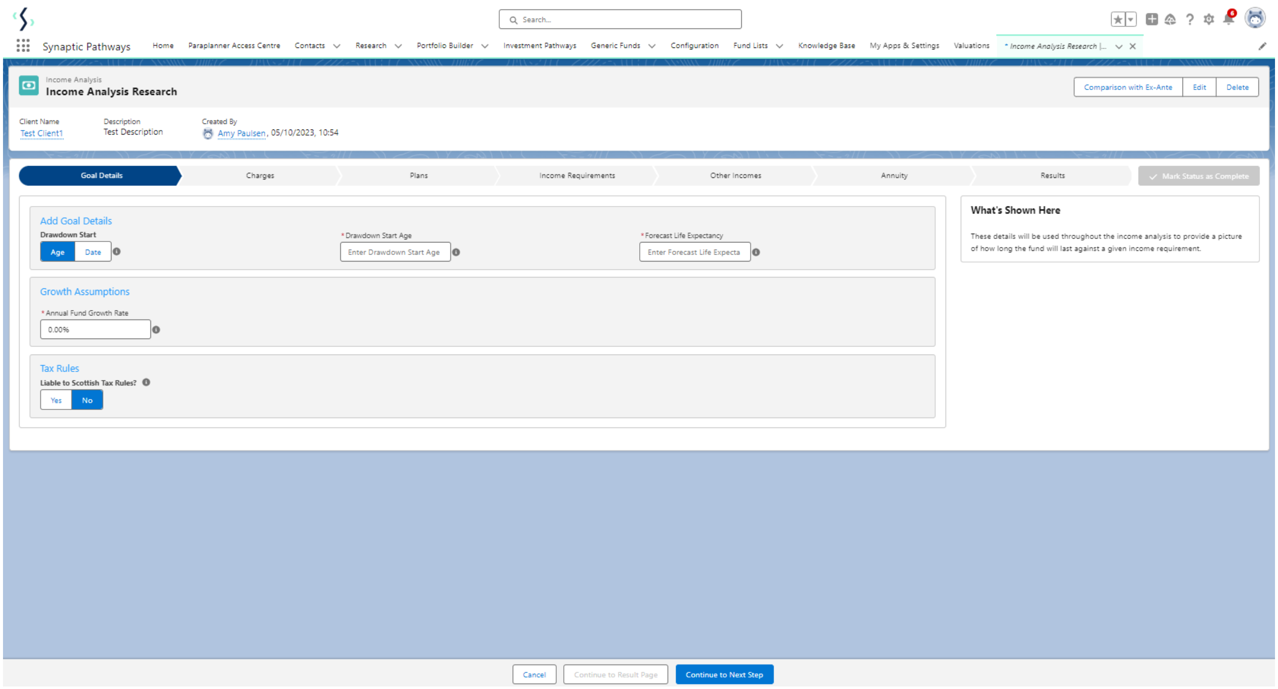
This article is a continuation of Income Analysis - Creating Research

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:



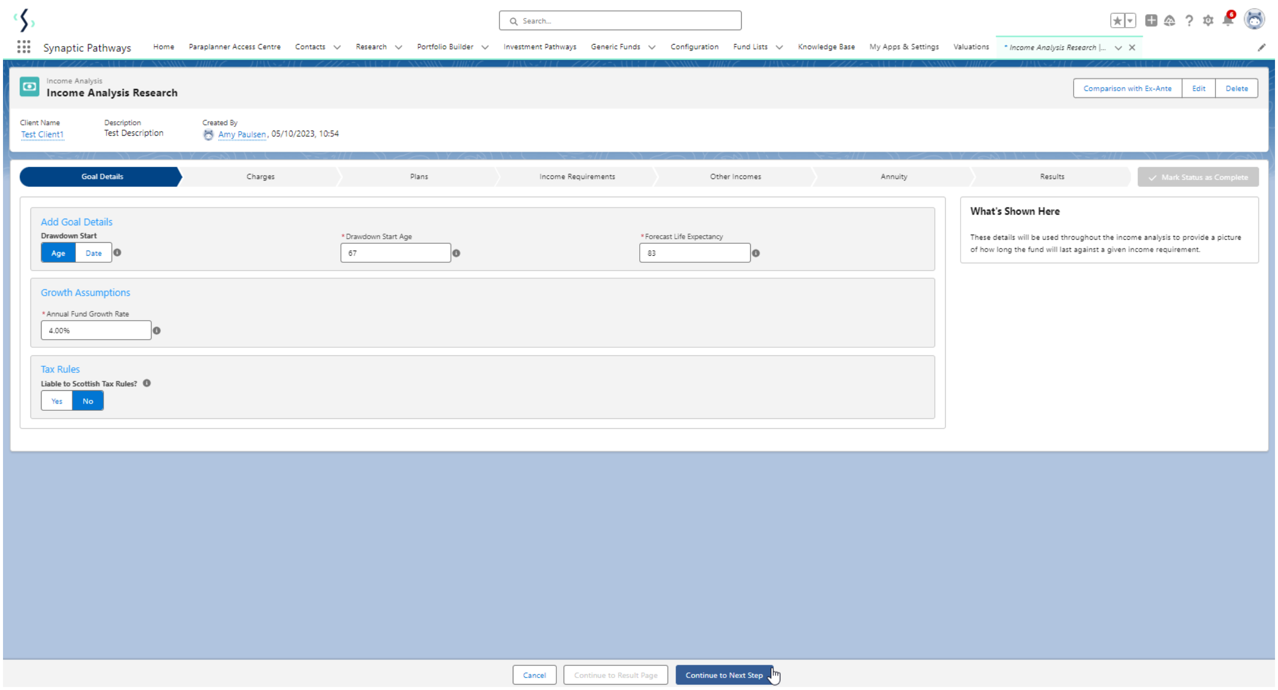
Drawdown Start – This information can be either an age or a date that you would like the drawdown plan to start.

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.

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.

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



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