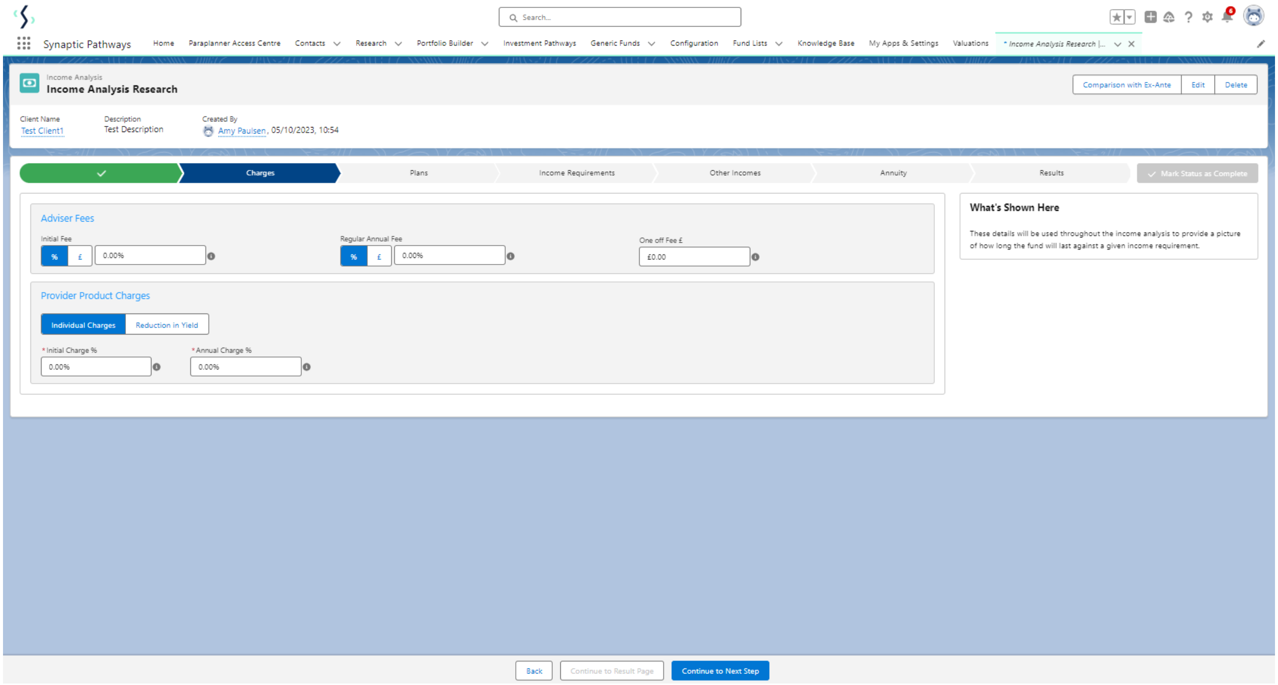
Income Analysis - Charges

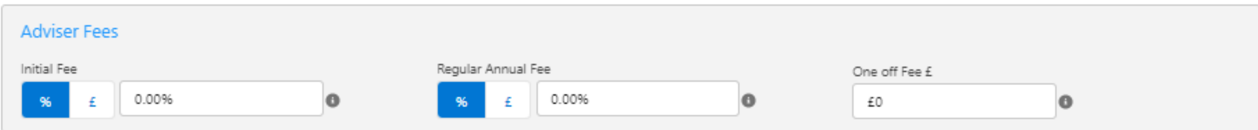
Last Modified on 02/08/2024 10:58 am BST

This article is a continuation of Income Analysis - Add Goal Details

Complete the **Charges** area:



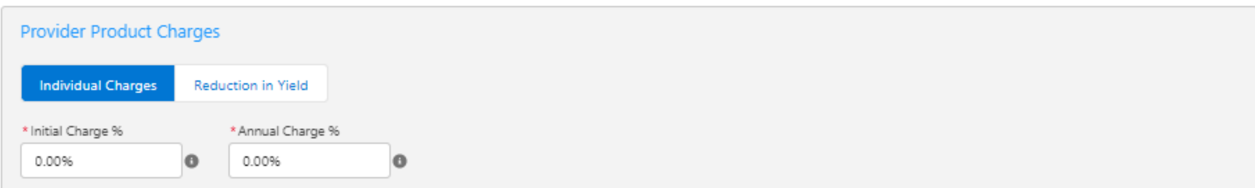
Adviser fees can be entered using either percentage or a monetary amount:

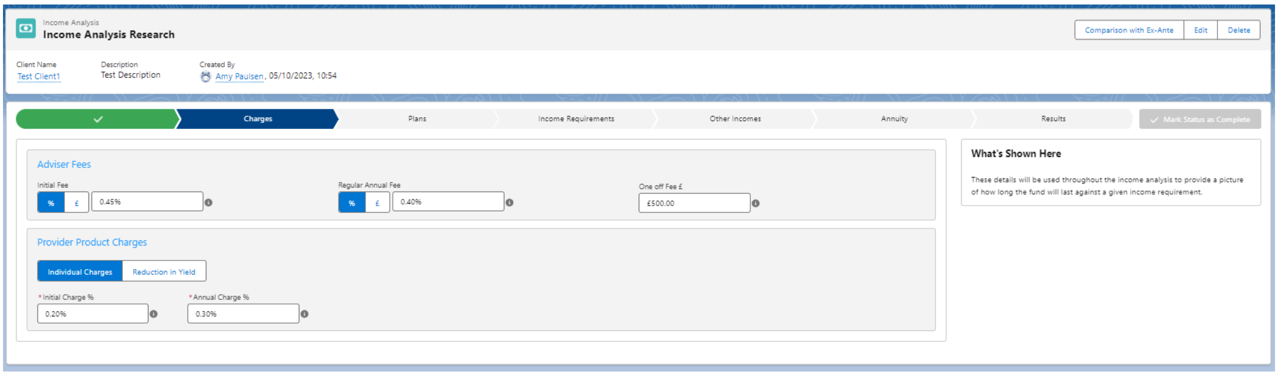


Provider Product Charges add either **Individual Charges** or **Reduction In Yield.**

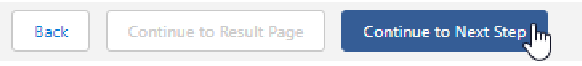
Provider product charges – these are needed to calculate the charges coming out of the drawdown product. Putting values in here will give a more realistic idea of how achievable the income profile is. Values can be input either as Individual Charges or as a Reduction in Yield (RIY).

If you are using RIY as the input type, please note to give a true reflection in the results the RIY figure used should be on the same basis as the growth rate figure input.





Once complete, **Continue to Next Step**



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