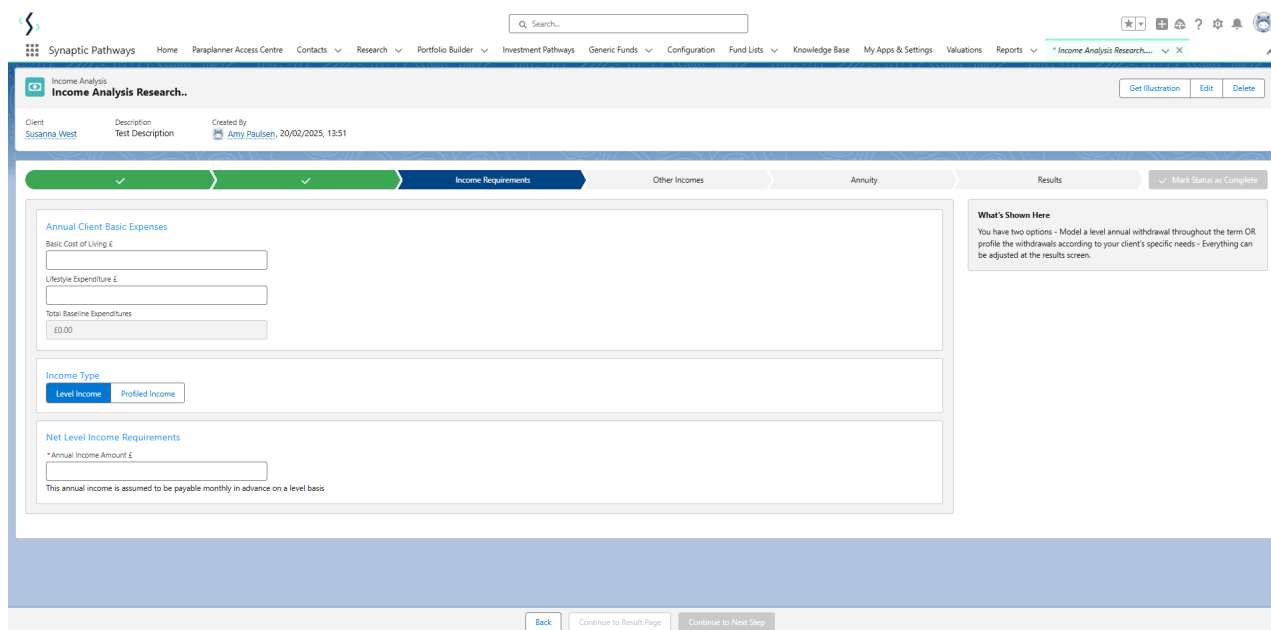


Income Analysis - Income Requirements

21/02/2025 11:47 am GMT

This article is a continuation of [Income Analysis - Add Plans](#)

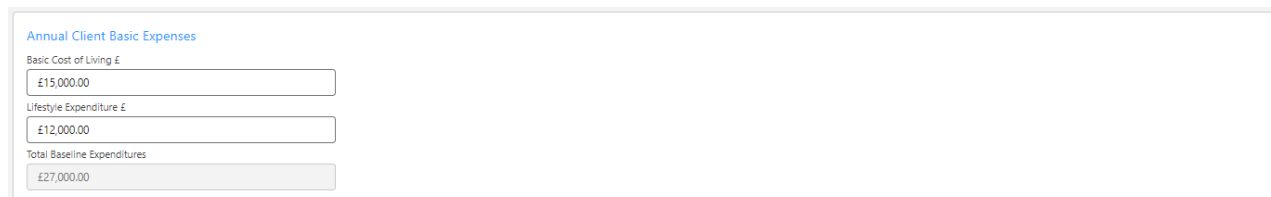
The **Income Requirements** area includes **Annual Client Basic Expenses** and **Level** or **Profiled Income**.



Annual Client Basic Expenses

Enter your client's annual basic expenses.

Complete the basic cost of living and lifestyle expenditure fields. This will calculate a Total Baseline Expenditure automatically:



These values are not used in the calculations, but allow you to capture this information for the final report.

Level Income

Level Income is selected by default once you land on the **Income Requirements** page.

Annual Client Basic Expenses

Basic Cost of Living £

Lifestyle Expenditure £

Total Baseline Expenditures

Income Type

Net Level Income Requirements

* Annual Income Amount £

This annual income is assumed to be payable monthly in advance on a level basis

Enter an Annual Income Amount and Continue to Next Step

Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Portfolio Builder
Investment Pathways
Generic Funds
Configuration
Fund Lists
Knowledge Base
My Apps & Settings
Val

Income Analysis
Income Analysis Research..

Client
Susanna West

Description
Test Description

Created By
Amy Paulsen, 20/02/2025, 13:51

✓

✓

Income Requirements

Other Incomes

Annuity

Annual Client Basic Expenses

Basic Cost of Living £

Lifestyle Expenditure £

Total Baseline Expenditures

Income Type

Net Level Income Requirements

* Annual Income Amount £

This annual income is assumed to be payable monthly in advance on a level basis

Profiled Income

Select Profiled Income:

✓
✓
Income Requirements
Other Incomes
Annuity

Annual Client Basic Expenses

Basic Cost of Living £

Lifestyle Expenditure £

Total Baseline Expenditures

Income Type

Profilled Income Requirements

! You must add at least one income requirement (single or regular) to continue

Start Age **67** Forecast Life Expectancy **84**

Regular Income Amounts

Single (One Off) Amounts

Regular and Single amounts can be added.

Regular

Click + Add:

Income Type

Profilled Income Requirements

! You must add at least one income requirement (single or regular) to continue

Start Age **67** Forecast Life Expectancy **84**

Regular Income Amounts

Single (One Off) Amounts

Add Name of the Regular Income Amounts:

Add Regular Amount

* Name	Choose Start	Choose End			
<input type="text" value="Living Expenses"/>	<input type="button" value="Age"/> <input type="button" value="Date"/> <input type="text"/>	<input type="button" value="Age"/> <input type="button" value="Date"/> <input type="text"/>			
* Amount	* Frequency	* Frequency Type	* Taken Monthly	Indexation	Indexation Rate %
<input type="text" value="0"/>	<input type="button" value="Select an Option"/>	<input type="button" value="Advanced"/> <input type="button" value="Arrears"/>	<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	<input type="button" value="None"/>	<input type="text" value="0.00%"/>
Reason					
<input style="width: 100%;" type="text" value="Add a reason..."/>					
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Save & New"/>					

Choose Age or Date:

*Name Choose Start * Choose End *

Complete remaining details.

Add a Reason up to 500 words.

Add Regular Amount

*Name Choose Start * Choose End *

*Amount *Frequency *Frequency Type *Taken Monthly Indexation Indexation Rate %

Reason

Annual Client Basic Expenses

Basic Cost of Living £

Lifestyle Expenditure £

Total Baseline Expenditures

Income Type

Profiled Income Requirements

Start Age **67** Forecast Life Expectancy **84**

Regular Income Amounts

Name	Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	Taken Monthly	Included
Living Expenses	2049-09-17	2054-09-17	£1,500.00	Monthly	Advance		<input checked="" type="checkbox"/>

Single (One Off) Amounts

To edit any details, click into the drop down arrow to the right of the record and click **Edit**:

Profiled Income Requirements

Start Age **67** Forecast Life Expectancy **84**

Regular Income Amounts

[+ Add](#)

Name	Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	Taken Monthly	Included	
Living Expenses	2049-09-17	2054-09-17	£1,500.00	Monthly	Advance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px;"> Edit </div> <div style="border: 1px solid black; padding: 2px;"> Delete </div>

Single (One Off) Amounts

[+ Add](#)

Save once done.

Single (One Off)

Click **+Add**:

Profiled Income Requirements

Start Age **67** Forecast Life Expectancy **84**

Regular Income Amounts

[+ Add](#)

Name	Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	Taken Monthly	Included	
Living Expenses	2049-09-17	2054-09-17	£1,500.00	Monthly	Advance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Single (One Off) Amounts

[+ Add](#)

Add Name of the **Single (One Off) Amounts**:

Add Single Amount

* Name Choose Start *

Living Expenses (One-off)

* Amount

Reason

Choose **Age or Date**:

* Name Choose Start *

Living Expenses

Complete remaining details.

Add a **Reason** up to 500 words.

Add Single Amount

* Name Choose Start *

Living Expenses Age Date 67

* Amount

£1,700

Reason

Add Reason up to 500 words

Cancel Save Save & New

Save

Income Type

Level Income Profiled Income

Profiled Income Requirements

Start Age **67** Forecast Life Expectancy **83**

Regular Income Amounts

+ Add

Name	Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	Included
Living Expenses	67	72	£1,500.00	Monthly	Advance	<input checked="" type="checkbox"/>

Single (One Off) Amounts

+ Add

Name	Start Age/Date	Amount	Included
Living Expenses	67	£1,700.00	<input checked="" type="checkbox"/>

To edit any details, click into the drop down arrow to the right of the record and click **Edit**:

Profiled Income Requirements

Start Age **67** Forecast Life Expectancy **83**

Regular Income Amounts

+ Add

Name	Start Age/Date	End Age/Date	Amount	Frequency	Frequency Type	Included
Living Expenses	67	72	£1,500.00	Monthly	Advance	<input checked="" type="checkbox"/>

Single (One Off) Amounts

+ Add

Name	Start Age/Date	Amount	Included
Living Expenses	67	£1,700.00	<input checked="" type="checkbox"/>

Save once done.

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