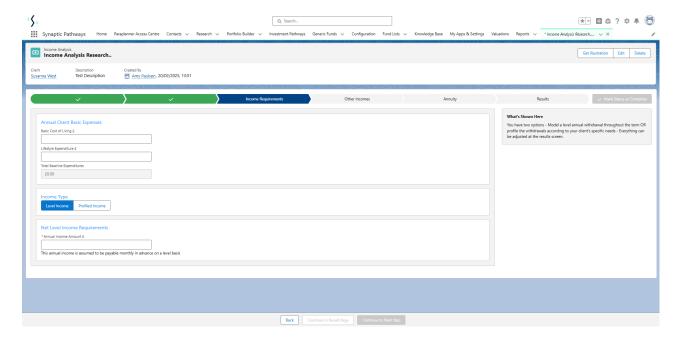
Income Analysis - Income Requirements

01/04/2025 1:38 pm BST

This article is a continuation of Income Analysis - Add Plans

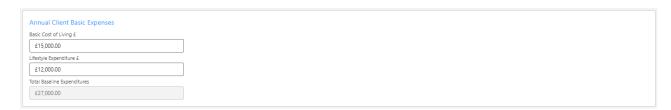
The Income Requirements area includes Annual Client Basic Expenses and Level or Profiled Income.



Annual Client Basic Expenses

Enter your client's annual basic expenses.

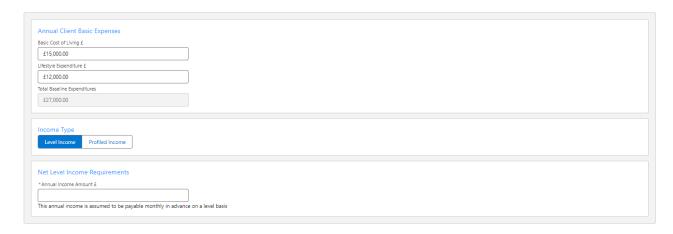
Complete the basic cost of living and lifestyle expenditure fields. This will calculate a Total Baseline Expenditure automatically:



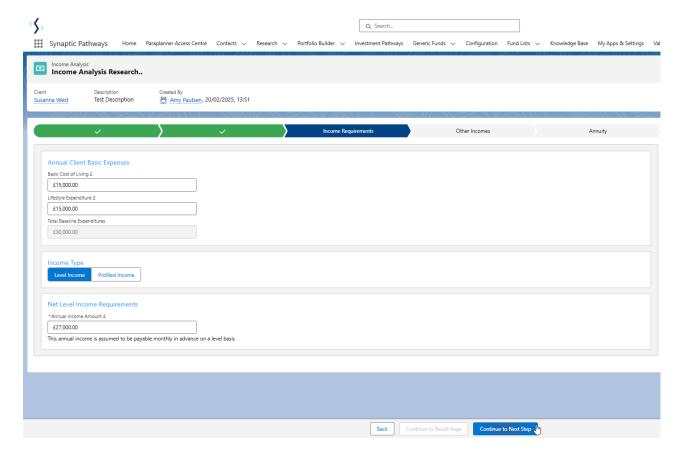
These values are not used in the calculations, but allow you to capture this information for the final report.

Level Income

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

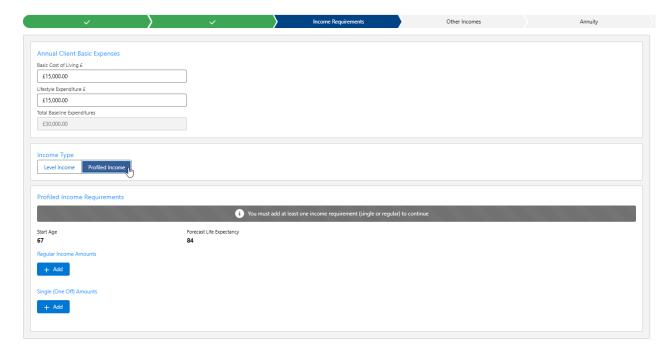


Enter an Annual Income Amount and Continue to Next Step



Profiled Income

Select Profiled Income:



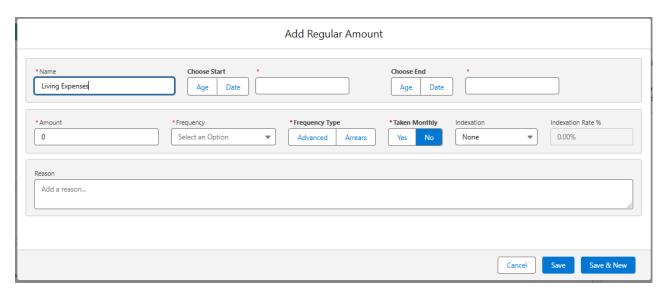
Regular and Single amounts can be added.

<u>Regular</u>

Click + Add:

Income Type Level Income Profiled Income	
Profiled Income Requirements	
i You must add at least one income requirement (single or regular) to continue	
Start Age 67	Forecast Life Expectancy 84
Regular Income Amounts	
+ Add	
Single (One Off) Amounts	
+ Add	

Add Name of the Regular Income Amounts:



Choose Age or Date:

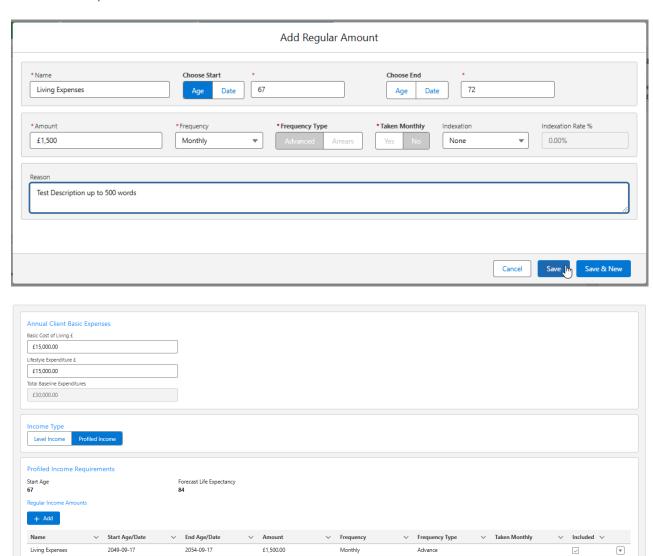


Complete remaining details.

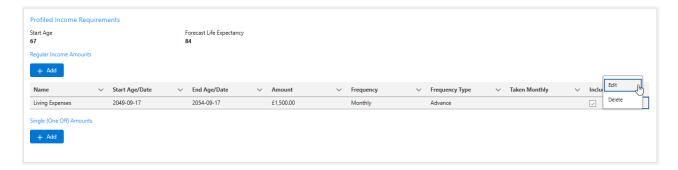
Single (One Off) Amounts

+ Add

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



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



Save once done.

Single (One Off)

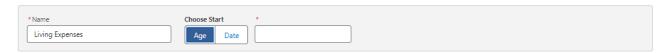
Click +Add:



Add Name of the Single (One Off) Amounts:

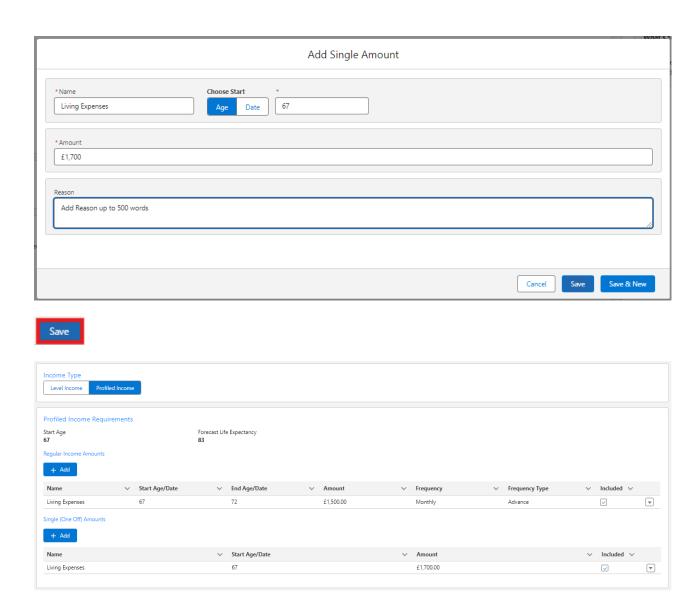


Choose Age or Date:

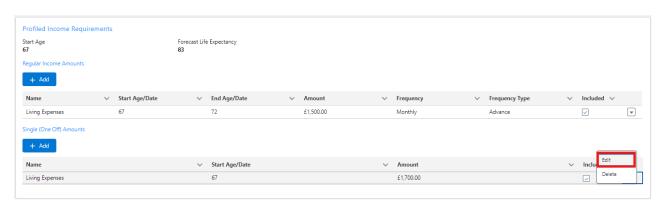


Complete remaining details.

Add a Reason up to 500 words.



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



Save once done.

For further information on Income Analysis research, see article Income Analysis - Other Incomes