

Income Analysis - Annuity

Last Modified on 23/04/2024 12:13 pm BST

This article is a continuation of [Income Analysis - Other Incomes](#)

From Projection

An annuity quote will automatically generate when clicking into the Annuity tab. This is an Indicative quote based on the projection:

The screenshot displays the 'Income Analysis' software interface. At the top, there is a navigation menu with options like 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', and 'Knowledge Base'. A search bar is also present. The main content area is titled 'Income Analysis April24' and includes a 'Get Illustration' button, 'Edit', and 'Delete' options. Below this, there is a client information section for 'Susanna West' and 'Amy Paulsen'. A progress bar shows several steps completed, with the 'Annuity' step currently active. The 'Indicative Annuity Income' section is expanded, showing a checked box for 'Include Indicative Annuity Income' and a selected button for 'From Projection'. The resulting value is 'Indicative Annuity Income £65,547.77 per annum gross'. There is also an 'Overriding Annuity Income' section with an unchecked box for 'Override indicative annuity quote'. An 'Additional Information' box on the right explains that the value returned is the best available Open Market Option (OMO) income. At the bottom, there are 'Back', 'Continue to Result Page', and 'Continue to Next Step' buttons.

From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base **Income Analysis April24** | L... X More

Income Analysis
Income Analysis April24 Get Illustration Edit Delete

Client Name: Susanna West Description: Created By: Amy Paulsen, 17/04/2024, 15:18

Indicative Annuity Income

Include Indicative Annuity Income

From Projection From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

SCOTTISH WIDOWS **£55,957.32** Standard Annuity Get Enhanced Annuity Quote

Overriding Annuity Income

Override indicative annuity quote

Additional Information

The value returned will be the best available OMO income at that time. If you already have an annuity quote or you know your client will benefit from an enhanced annuity you can override the Indicative standard annuity quote value by using the functionality.

Back Continue to Result Page **Continue to Next Step**

Click **Get Enhanced Annuity Quote** if needed. This will open Synaptic Webline in a new tab.

Indicative Annuity Income

Include Indicative Annuity Income

From Projection From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

SCOTTISH WIDOWS **£55,957.32** Standard Annuity Get Enhanced Annuity Quote

Overriding Annuity Income

Override indicative annuity quote

Webline **Cost & Charge Comparison** Reduction in gift calculations on and off platform comparisons Whole-of-market or GIP Start your 30-day trial today Webline Admin Amy A Wood Tue 23 Apr 2024, 12:00

Quote Track Users Settings Admin Sys Admin Info Synaptic Website Log out

Product Details: > **10** Client Questions

> **10** Product Information

Client A:

Client B:

Detailed Quote Form

Client Details

Clients Life A Include Life B

Title *

Forename *

Surname *

Gender Male Female *

Date of Birth dd/mm/yyyy *

Is a smoker Yes No *

Marital Status Please choose *

Present Occupation *

FullTime FullTime PartTime *

Previous Occupation

Untick **Include Indicative Annuity Income** if not required.

Indicative Annuity Income

Include Indicative Annuity Income

From Projection From Provider Quote

The indicative annuity income as per the projections.

Indicative Annuity Income

£76,718.07 per annum gross.

Overriding Annuity Income

Override indicative annuity quote

Income Analysis
Test Income Analysis 1 Comparison with Ex-ANTE Edit Delete

Client Name: Susanna West | Description: Test Description | Created By: Amy Paulsen, 05/10/2023, 12:31

Progress: [Steps 1-5 complete] **Annuity** Results Mark Status as Complete

Indicative Annuity Income

Include Indicative Annuity Income

Additional Information

The value returned will be the best available OMO income at that time. If you already have an annuity quote or you know your client will benefit from an enhanced annuity you can override the indicative standard annuity quote value by using the functionality.

Override Annuity Quote

Overriding Annuity Income

Override indicative annuity quote

Overriding Annuity Income

Override indicative annuity quote

Please enter the value here if you already have an annuity quote. Your value will override any indicative standard annuity quote value shown in the results and reports generated.

* Amount

* Basis