

# Income Analysis - Annuity

Last Modified on 02/08/2024 2:10 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 shows the 'Income Analysis Research' interface. At the top, there is a navigation menu with options like Synaptic Pathways, Home, Paraplanner Access Centre, etc. The main header includes 'Income Analysis Research' and buttons for 'Get Illustration', 'Edit', and 'Delete'. Below the header, client information is displayed: Client Name 'Susanna West', Description 'Test Description', and Created By 'Amy Paulsen, 02/08/2024, 10:43'. A progress bar at the top indicates the current step is 'Annuity'. The main content area is divided into two sections: 'Indicative Annuity Income' and 'Overriding Annuity Income'. In the 'Indicative Annuity Income' section, the 'Include Indicative Annuity Income' checkbox is checked. Below it, there are two buttons: 'From Projection' (selected) and 'From Provider Quote'. The text states 'The indicative annuity income as per the projections.' A box displays 'Indicative Annuity Income £73,407.92 per annum gross'. The 'Overriding Annuity Income' section has an unchecked 'Override indicative annuity quote' checkbox. To the right, an 'Additional Information' box explains that the value returned is the best available OMO income at that time. 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

The screenshot shows the 'Income Analysis April24' interface. The navigation menu and header are similar to the previous screenshot. Client information is: Client Name 'Susanna West', Description 'Test Description', and Created By 'Amy Paulsen, 17/04/2024, 15:18'. The progress bar indicates the current step is 'Annuity'. The 'Indicative Annuity Income' section has the 'Include Indicative Annuity Income' checkbox checked. The 'From Provider Quote' button is selected. The text states 'This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.' A box displays 'Indicative Annuity Income Quote (highest per annum gross return) £55,957.32 Standard Annuity' with the 'SCOTTISH WIDOWS' logo and a 'Get Enhanced Annuity Quote' button. The 'Overriding Annuity Income' section has an unchecked 'Override indicative annuity quote' checkbox. The 'Additional Information' box on the right is the same as in the previous screenshot. At the bottom, there are 'Back', 'Continue to Result Page', and 'Continue to Next Step' buttons.


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.

 **Indicative Annuity Income Quote (highest per annum gross return)**  
**£55,957.32**  
Standard Annuity

[Get Enhanced Annuity Quote](#)

**Overriding Annuity Income**

Override indicative annuity quote

Product Details: > **13** Client Questions  
- **10** Product Information  
Client A:  
Client B:

### Detailed Quote Form

Client Details

Clients	Life A	<input type="checkbox"/> Include Life B
Title	<input type="text"/>	<input type="text"/>
Forename	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Gender	<input type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female
Date of Birth	<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>
Is a smoker	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Marital Status	<input type="text" value="Please choose"/>	<input type="text" value="Please choose"/>
Present Occupation	<input type="text"/>	<input type="text"/>
FullTime	<input type="radio"/> FullTime <input type="radio"/> PartTime	<input type="radio"/> FullTime <input type="radio"/> PartTime
Previous Occupation	<input type="text"/>	<input type="text"/>

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 En-Ante
Edit
Delete

Client Name <a href="#">Susanna West</a>	Description Test Description	Created By <a href="#">Amy Paulsen</a> , 05/10/2023, 12:31
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Indicative Annuity Income  
 Include Indicative Annuity Income

Additional Information  
The value returned will be the best available QMID 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