

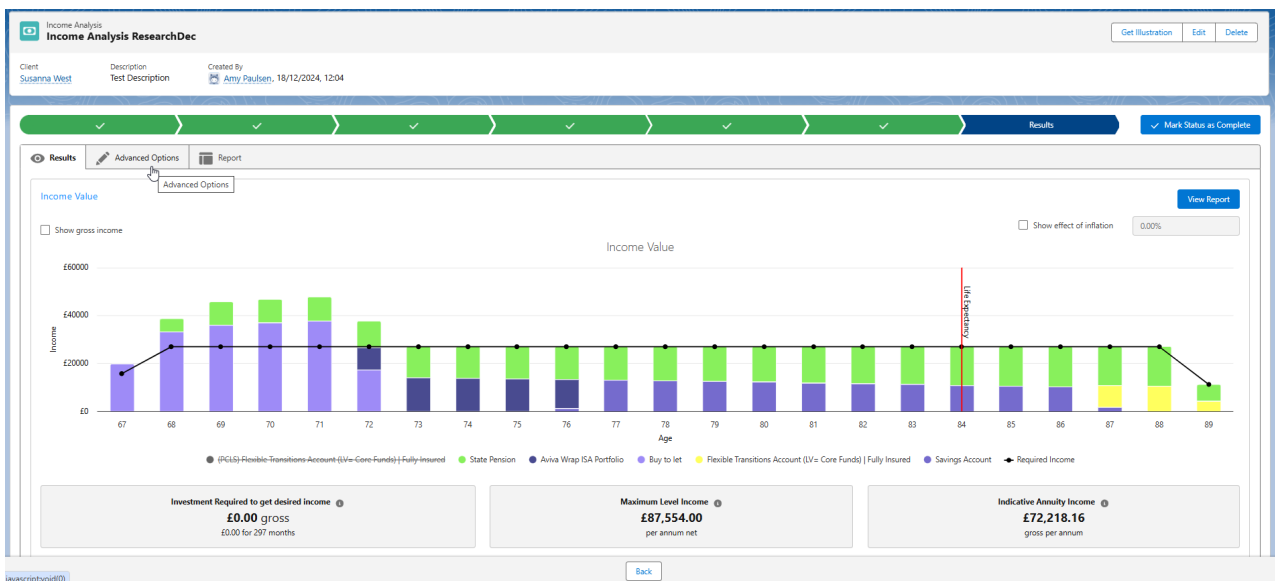
Income Analysis - Advanced Options

Last Modified on 18/12/2024 12:24 pm GMT

This article is a continuation of [Income Analysis - Results - Export Charts](#)

Advanced options allows you to create and compare up to 3 additional scenarios.

Advanced Options will show the original income analysis scenario.



Change any input made in the Income analysis journey:

- Goal Details
- Charges
- Plans
- Other Incomes
- Savings Accounts
- Income Requirements
- Annuity
- Income Hierarchy

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations *Income Analysis ResearchDec

Income Analysis ResearchDec

Results Advanced Options Report

Illustration Settings & Income

Goal Details

Drawdown Start

Age: 67

Date: []

* Drawdown Start Age

Annual Fund Growth Rate: 7.39%

Client Details - Susanna West

* Forecast Life Expectancy: 84

Liable to Scottish Tax Rules? [Yes/No]

> Charges

> Plans

> Other Incomes

> Saving Accounts

Preferred Scenario: Income Analysis ResearchDec (Preferred)

Income Value

Show gross income Show effect of inflation: 0.00%

Investment Required to get desired income: £0.00 gross (£0.00 for 297 months)

Maximum Level Income: £87,554.00 per annum net

Indicative Annuity Income: £72,218.16 gross per annum

Fund Value

Income Requirements

Income Type: Level Income

Annual Income Amount £: £27,000.00

> Annuity

Income Hierarchy

Enable custom withdrawal order: Turn this option on to define a specific order for withdrawals from your holding or savings account.

Enable Custom Drawdown Order: [Inactive]

Drag and drop the items below to set the priority for withdrawals.

- Flexible Transitions Account (LV= Core Funds) | Fully Insured
- Colfunds Pension Account
- Aviva Wrap ISA Portfolio
- Savings Account

Back

See article: [Income Analysis - Advanced Options - Creating Scenarios](#) for further information.