

# Income Analysis - Advanced Options

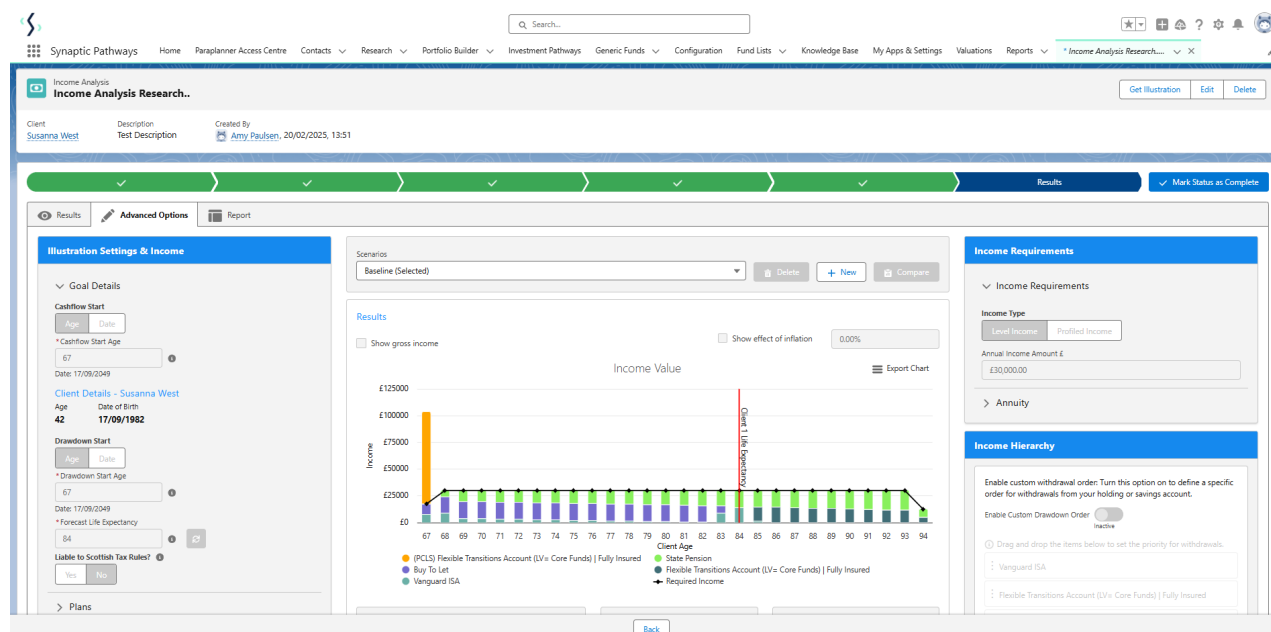
01/04/2025 1:49 pm BST

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. This is your **Baseline**.

All options within your Baseline scenario will be greyed out. This is for comparison purposes only



You will need to create additional scenarios to use to compare against each and your baseline scenario.

Change any input made in the Income analysis journey:

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

**Income Analysis Research..** Get Illustration Edit Delete

Client: **Susanna West** | Description: **Test Description** | Created By: **Amy Paulsen**, 20/02/2025, 13:51

Results Mark Status as Complete

Results Advanced Options Report

### Illustration Settings & Income

**Goal Details**

**Cashflow Start**  
 Age:  Date:   
 \* Cashflow Start Age:   
 Date: 17/09/2049

**Client Details - Susanna West**  
 Age:  Date of Birth:

**Drawdown Start**  
 Age:  Date:   
 \* Drawdown Start Age:   
 Date: 17/09/2049  
 \* Forecast Life Expectancy:

**Liability to Scottish Tax Rules?**  
 Yes  No

**Plans**  
 > Other Incomes  
 > Saving Accounts

### Income Requirements

**Income Requirements**

Income Type:

Annual Income Amount £:

> 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.

- Vanguard ISA
- Flexible Transitions Account (LV= Core Funds) | Fully Insured
- Personal Pension (TEST) | Fully Insured

### Scenario Editor

Stock Scenarios:  
 Select a stock scenario...

Year to Apply Scenario:

Pot Adjustment:

**No pot adjustment will be made**

Scenarios: **Baseline (Selected)** Delete + New Compare

**Results**

Show gross income  Show effect of inflation: 0.00% Export Chart

**Investment Required to get desired income**  
**£0.00** gross  
 £0.00 for 295 months

**Maximum Level Income**  
**£55,703.00**  
 per annum net

**Indicative Annuity Income**  
**£51,286.32**  
 gross per annum

**Fund Value** Export Chart

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