

Income Analysis - Advanced Options

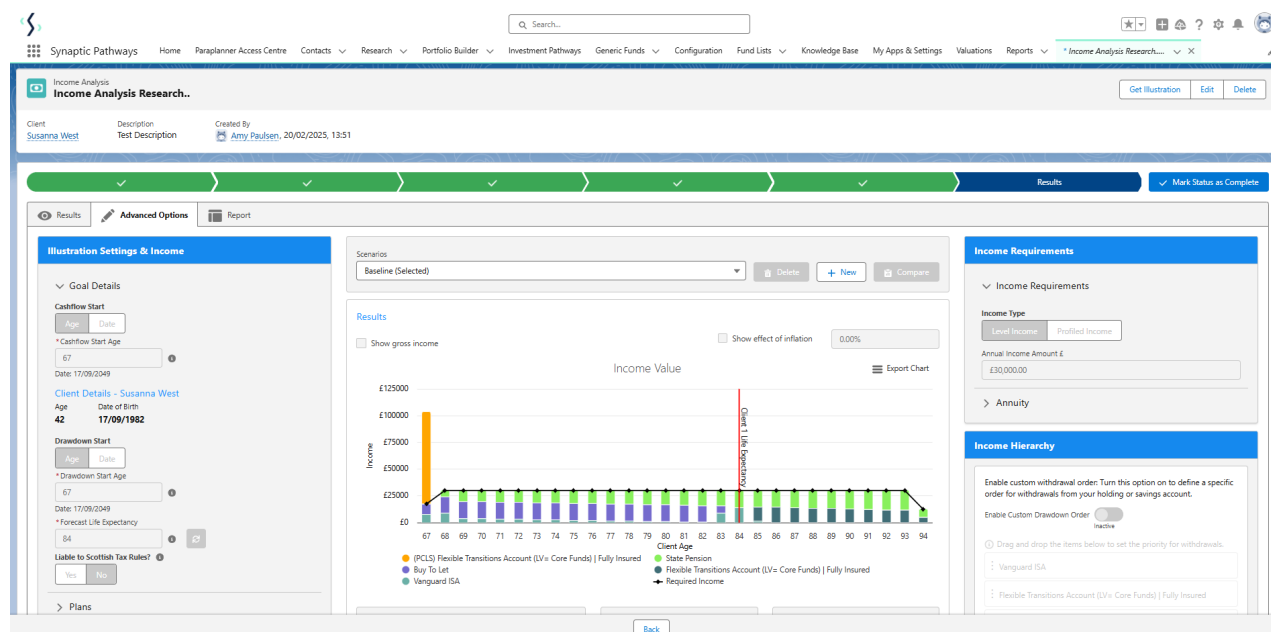
21/02/2025 3:18 pm GMT

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. 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

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:

Client Details - Susanna West
 Age: Date of Birth:

Drawdown Start
 Age: Date:
 * Drawdown Start Age:
 * Forecast Life Expectancy:

Liable to Scottish Tax Rules?
 Yes No

> Plans
 > Other Incomes
 > Saving Accounts

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: 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](#)

Legend for Income Value:
 (PCL) Flexible Transitions Account (LV= Core Funds) | Fully Insured
 Buy To Let
 Vanguard ISA
 State Pension
 Flexible Transitions Account (LV= Core Funds) | Fully Insured
 Required Income

Legend for Fund Value:
 Initial Amount
 Flexible Transitions Account (LV= Core Funds) | Fully Insured
 Personal Pension (TEST) | Fully Insured
 Vanguard ISA

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