

# Income Analysis - Advanced Options - Creating Scenarios

01/04/2025 1:48 pm BST

This article is a continuation of [Income Analysis - Advanced Options](#)

Add a new scenario by selecting + New

The screenshot shows the 'Income Analysis' software interface. The 'Advanced Options' tab is active. In the 'Scenarios' section, the 'Baseline (Selected)' dropdown is visible, and the '+ New' button is highlighted with a red box. The 'Results' section displays an 'Income Value' chart with a vertical line for 'Client Life Expectancy' at age 84. The 'Income Requirements' section shows 'Level Income' and 'Profiled Income' options.

Name the new scenario and click OK

The screenshot shows the 'Create New Scenario' dialog box. The title is 'Scenario Name'. The input field contains 'Test Scenario 1'. There are 'Cancel' and 'OK' buttons.

This will copy the original scenarios details, ready to modify.

The screenshot shows the 'Income Analysis' software interface. The 'Advanced Options' tab is active. In the 'Scenarios' section, the 'Test Scenario 1 (Selected)' dropdown is visible. The 'Results' section displays the same 'Income Value' chart as in the previous screenshot.

Change any input made in the Income analysis journey:

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

The screenshot displays the 'Income Analysis Research' interface. At the top, it shows the client name 'Susanna West', description 'Test Description', and creation details by 'Amy Paulsen' on '20/02/2025, 13:51'. The interface is divided into several sections:

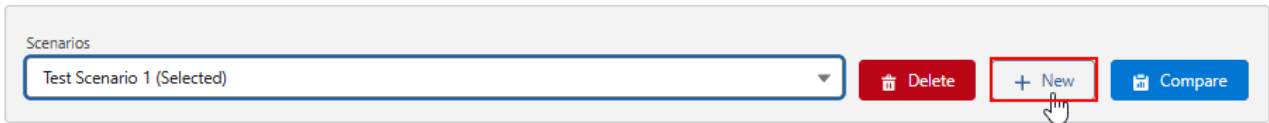
- Illustration Settings & Income:** Contains 'Goal Details' with 'Cashflow Start' (Age: 67, Date: 17/09/2049) and 'Drawdown Start' (Age: 67, Date: 17/09/2049). It also includes 'Client Details - Susanna West' (Age: 42, Date of Birth: 17/09/1982) and 'Forecast Life Expectancy' (Age: 84). There are options for 'Plans', 'Other Incomes', and 'Saving Accounts'.
- Results:** Features a 'Scenarios' dropdown set to 'Test Scenario 1 (Selected)' with '+ New' and 'Compare' buttons. It includes two charts: 'Income Value' (Y-axis: £0 to £120,000) and 'Fund Value' (Y-axis: £0 to 1000k). Both charts show a 'Client Life Expectancy' line at age 84. Below the charts are three summary boxes: 'Investment Required to get desired income' (£0.00 GROSS), 'Maximum Level Income' (£55,703.00 per annum net), and 'Indicative Annuity Income' (£51,286.32 gross per annum).
- Income Requirements:** Lists 'Regular Income Amounts' and 'Single Income Amounts'. Under 'Regular Income Amounts', there are two entries: 'Living Expenses - Age 67 - Age 79' (Regular, Monthly, £1,500.00) and 'Living Expenses - Age 79 - Age 83' (Regular, Monthly, £1,800.00). Under 'Single Income Amounts', there is one entry: 'One Off Cost- Age 68' (Single, £2,000.00). There is also an 'Annuity' section.
- Income Hierarchy:** Includes a toggle for 'Enable custom withdrawal order' (currently inactive) and a list of assets for withdrawal priority: Vanguard ISA, Flexible Transitions Account (LV= Core Funds) | Fully Insured, and Personal Pension (TEST) | Fully Insured.
- Scenario Editor:** Features a 'Stock Scenarios' dropdown, 'Year to Apply Scenario' (0-17), and a 'Pot Adjustment' slider. A message at the bottom states 'No pot adjustment will be made'.

Additional scenarios can be created through the + New button.

Scenarios

Test Scenario 1 (Selected) ▼

Delete + New Compare



View the additional scenarios through the dropdown:

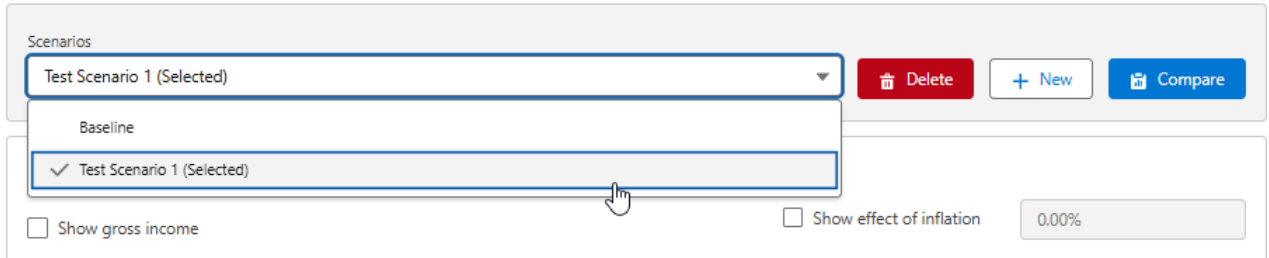
Scenarios

Test Scenario 1 (Selected) ▼

Baseline

✓ Test Scenario 1 (Selected)

Show gross income Show effect of inflation 0.00%



See next article [Income Analysis - Advanced Options - Editing Scenarios](#)

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