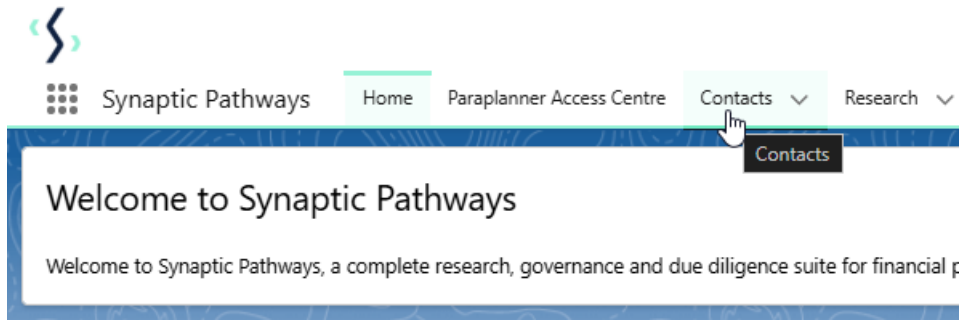
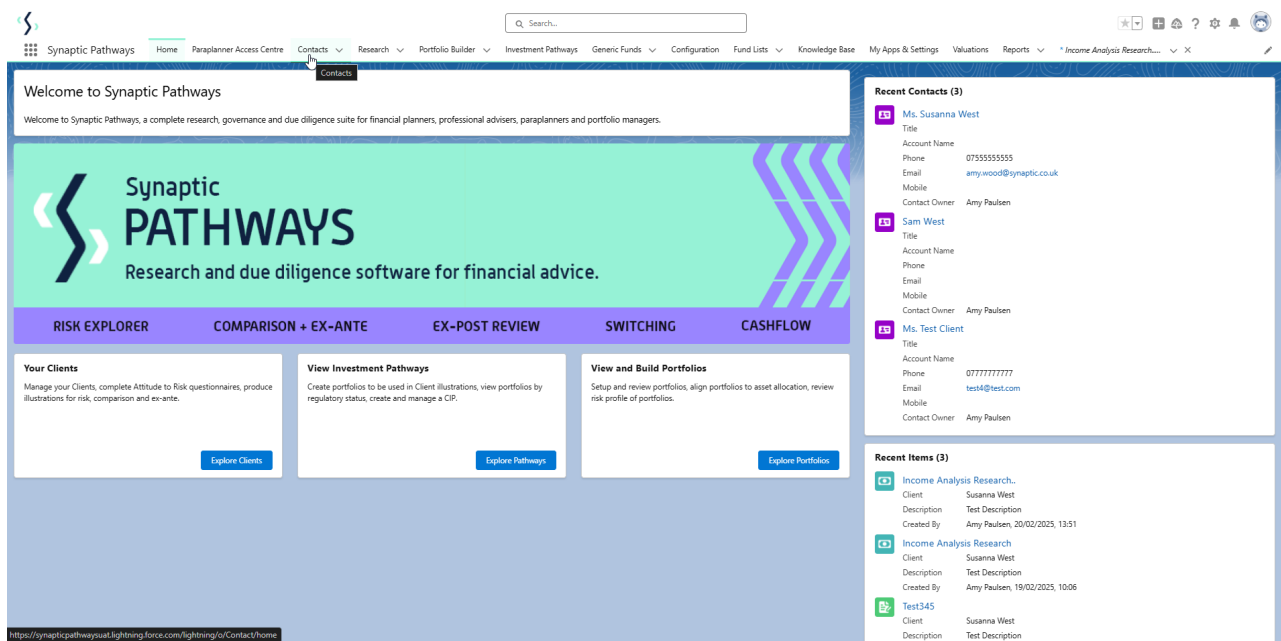


Income Analysis - Joint Life - Create Research

22/04/2025 12:14 pm BST

Create Joint Income Analysis research through the Contact record.

Navigate to **Contacts** tab:



Find your client in the list or search:



Contacts	
Recently Viewed	
4 items • Updated a few seconds ago	
<input type="checkbox"/> Name	Account Name
1 <input type="checkbox"/> Susanna West	
2 <input type="checkbox"/> Sam West	Susanna West
3 <input type="checkbox"/> Test Client	
4 <input type="checkbox"/> Les West	

Scroll down to **Income Analysis** and click **New**:

Synaptic PathwaysHomeParaplanner Access CentreContactsResearchPortfolio BuilderInvestment PathwaysGeneric FundsConfigurationFund ListsKnowledge BaseMy Apps & SettingsValuationsReportsIncome Analysis Research...

Search...

StarIconHelp?SettingsUser

Ms. Susanna West

+ FollowEditNew ContactNew Opportunity

<input type="checkbox"/>	Illustration Name	Research Type	Description	Activity Due Date	Last Modified By	Convert To...
1	Test345	Comparison with Ex-ante	Test Description	01/02/2025	Amy Paulsen	
2	Test Switching	Switch	Test	25/10/2024	Amy Paulsen	
3	Test Switching	Ex-ante	Test		Amy Paulsen	
4	Test Switch	Switch	Test Description	03/12/2023	Amy Paulsen	
5	Test Switch	Ex-ante	Test Description		Amy Paulsen	

View All

Income Analysis (5)

New

5 items • Updated a few seconds ago

<input type="checkbox"/>	Goal Name	Income Re...	Goal Type	Holdings	Fund Value	Income Se...	Review Date	Convert To
1	Income Analysis Research...						10/10/2024	Comparison With Ex-Ante
2	Phased Income Analysis						31/01/2025	Comparison With Ex-Ante
3	Test Income Analysis						25/01/2025	Comparison With Ex-Ante
4	Income Analysis Research						28/02/2025	Comparison With Ex-Ante
5	Income Analysis Research...						01/03/2025	Comparison With Ex-Ante

View All

Protection (5)

New

5 items • Updated a few seconds ago

<input type="checkbox"/>	Protection Name	Description	Created Date
1	Protection Quote Test	Test Description Test	22/02/2024, 11:33
2	Protection Quote		06/03/2024, 10:22
3	Test		07/11/2024, 14:40
4	Test1		07/11/2024, 15:41
5	Test		11/12/2024, 11:56

View All

Complete **New Income Analysis** details, including whether you would like to use the accumulation or decumulation questionnaire risk rating in the research.

Balanced (High End)15

Balanced (High End)10

New Income Analysis

* = Required Information

Information

* Client

ES

Susanna West

X

* Goal Name

↶

Joint Income Analysis Research

Description

↶

Test Description

* Review Date

↶

22/04/2025

📅

* Accumulation / Decumulation

Decumulation

--None--

Accumulation

✓ Decumulation

Save & New

Save

Save

New Income Analysis

* = Required Information

Information

* Client

ES

Susanna West

X

* Goal Name

↶

Joint Income Analysis Research

Description

↶

Test Description

* Review Date

↶

22/04/2025

📅

* Accumulation / Decumulation

Decumulation

Cancel

Save & New

Save

Click into the below link or into the newly created research:

Income Analysis "Joint Income Analysis Research" was created. X

Income Analysis (4)								New	
4 Items • Updated a few seconds ago									
	Goal Name	Income Re...	Goal Type	Holdings	Fund Value	Income So...	Review Date	Convert To	
1	Income Analysis Research						28/02/2025	Comparison With Ex-Ante	
2	Phased Drawdown						10/04/2025		
3	Test Income						19/04/2025	Comparison With Ex-Ante	
4	Joint Income Analysis Research						22/04/2025		

Joint Income Analysis Research

Client

Susanna West

Description

Test Description

Created By

Amy Paulsen, 22/04/2025, 1...

View All

This will take you into the **Goal Details** screen:

Synaptic Pathways

Home

Paraplanner Access Centre

Contacts

Research

Portfolio Builder

Investment Pathways

Generic Funds

Configuration

Fund Lists

Knowledge Base

My Apps & Settings

Valuations

Reports

Joint Income Analysis Res...

More

Income Analysis

Joint Income Analysis Research

Get Illustration

Edit

Delete

Client

Susanna West

Description

Test Description

Created By

Amy Paulsen, 22/04/2025, 12:11

Goal Details

Plans

Income Requirements

Other Incomes

Annuity

Results

Mark Status as Complete

Add Goal Details

Cashflow Start

Age

Date

Enter Cashflow Start Age

Date: 17/08/1982

Client Details - Susanna West

Age

42

Date of Birth

17/09/1982

Drawdown Start

Age

Date

Enter Drawdown Start Age

Date: 17/08/1982

Retirement Start

Age

Date

Enter Retirement Start Age

Date: 17/08/1982

Forecast Life Expectancy

64

Liable to Scottish Tax Rules?

Yes

No

Tax Rate

Current Tax Rate

Client Details - Second Client

+ Add Second Client

What's Shown Here

These details will be used throughout the income analysis to provide a picture of how long the fund will last against a given income requirement.

Cancel

Continue to Result Page

Continue to Next Step

For further information on Income Analysis research, see article [Income Analysis - Joint Life - Add Goal Details](#)