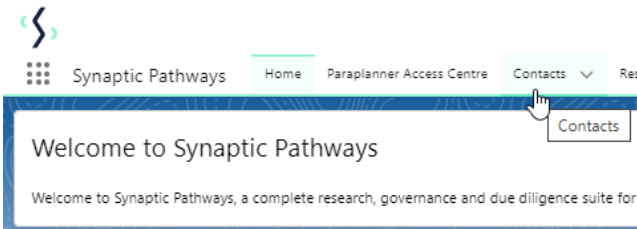
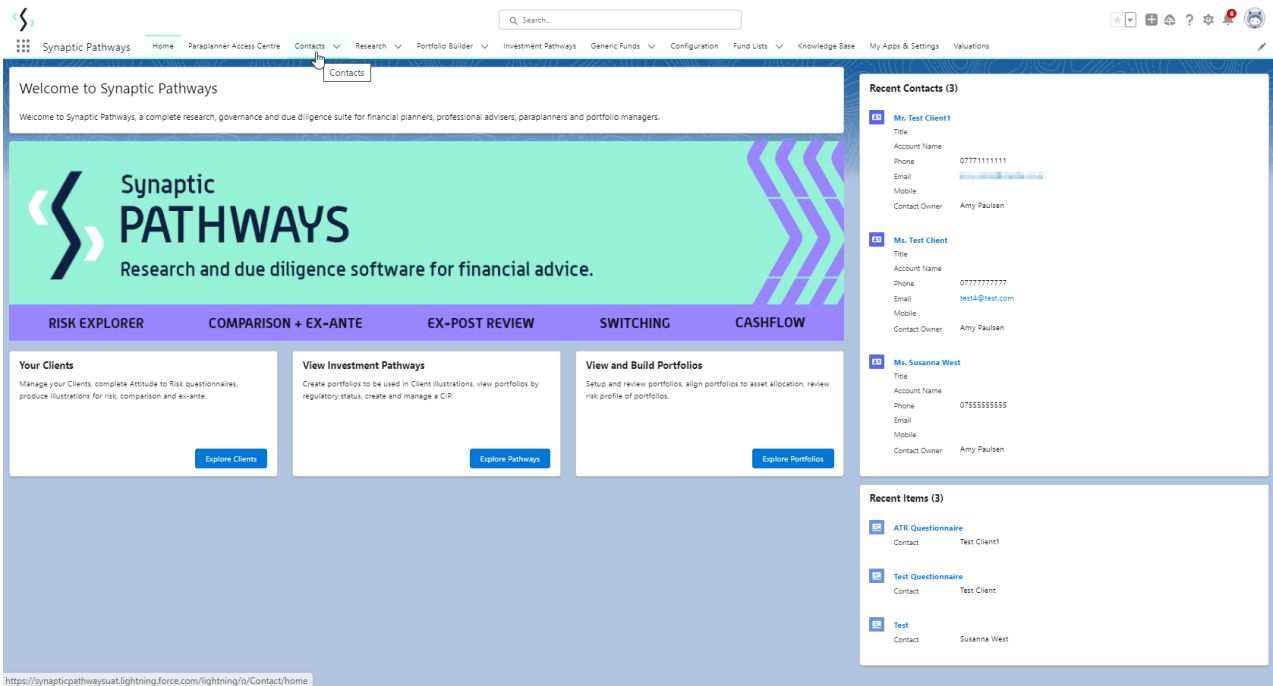


Income Analysis - Joint Life - Create Research

Last Modified on 30/09/2024 4:34 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 Contacts

6 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

	Name ↑	Account Name
1	Ben Smith	
2	Mike Smith	
3	Steve Test	
4	Test Client	
5	test client account	test client account
6	Test Client1	

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

Contact: Mr. Test Client1

Follow Edit New Contact New Opportunity

Related Details Medical Holdings Related Contacts Family ALUM

We found no potential duplicates of this Contact.

Client Questionnaires (1)

Client Questionnaire Name	Completed...	Risk Category	Risk Rating	Default ↑
ATR Questionnaire	No	Moderately Cautious (High End)	4	

Risk Illustrations (1)

Illustration Name	Description...	Target Risk Category	Term	Review Date
Risk Illustration		Moderately Cautious (High End)	10	

Research (0) [New](#)

Income Analysis (0) [New](#)

Protection (0) [New](#)

Opportunities (0) [New](#)

Cases (0) [New](#)

Recent Items (3)

- [ATR Questionnaire](#) Contact: Test Client1
- [Test Questionnaire](#) Contact: Test Client
- [Test](#) Contact: Susanna West

Activity Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Complete **New Income Analysis** details:

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

Description
Test Description

* Review Date
19/10/2024

Calendar: October 2024. Date 19 is selected.

Buttons: Save & New, Save

Save

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

Description
Test Description

* Review Date
19/10/2024

Buttons: Cancel, Save & New, Save

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

Income Analysis "Income Analysis Research" was created.

The screenshot shows the 'Income Analysis (1)' interface. At the top, it indicates '1 item • Updated a few seconds ago'. Below this is a table with columns for 'Goal Name', 'Client Name', 'Description', 'Type', 'Holdings', 'Fund Value', 'Income So...', and 'Review Date'. A modal window titled 'Income Analysis Research' is open, displaying details for a goal named 'Income Analysis Research'. The modal includes fields for 'Client Name' (Test Client1), 'Description' (Test Description), and 'Created By' (Amy Paulsen, 05/10/2023, 10:54). A 'View All' link is also visible in the modal.

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

The screenshot shows the 'Add Goal Details' screen for 'Income Analysis Research'. The page header includes a search bar and navigation links. The main content area is divided into several sections:

- Client Information:** Client: Susanna West, Description: Test, Created By: Amy Paulsen, 30/09/2024, 14:17.
- Goal Details:** Includes fields for 'Drawdown Start' (Age/Date), '*Drawdown Start Age' (Enter Drawdown Start Age), and '*Annual Fund Growth Rate' (0.00%).
- Client Details - Susanna West:** Includes 'Forecast Life Expectancy' (83), 'Liable to Scottish Tax Rules?' (Yes/No), and 'Tax Rate' (Current Tax Rate, At Retirement Tax Rate).
- Client Details - Second Client:** Includes a '+ Add Second Client' button.
- What's Shown Here:** A note stating: '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.'

 At the bottom, there are buttons for 'Cancel', 'Continue to Result Page', and 'Continue to Next Step'.

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