

# Income Analysis - Joint Life - Create Research

24/02/2025 3:14 pm GMT

Create Joint Income Analysis research through the Contact record.

Navigate to **Contacts** tab:

The screenshot shows the Synaptic Pathways dashboard. The navigation menu at the top includes: Synaptic Pathways, Home, Paraplanner Access Centre, **Contacts** (highlighted), Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, Valuations, Reports, and Income Analysis Research. The main content area features a welcome message, the Synaptic Pathways logo, and several functional tiles: RISK EXPLORER, COMPARISON + EX-ANTE, EX-POST REVIEW, SWITCHING, and CASHFLOW. Below these are three tiles for 'Your Clients', 'View Investment Pathways', and 'View and Build Portfolios'. On the right side, there are two panels: 'Recent Contacts (3)' listing Ms. Susanna West, Sam West, and Ms. Test Client; and 'Recent Items (3)' listing research items for Susanna West and Test1345.

This is a close-up view of the navigation menu. The 'Contacts' tab is highlighted with a mouse cursor, and a dropdown menu is visible below it, showing the 'Contacts' option. The other tabs visible are Home, Paraplanner Access Centre, and Research.

Find your client in the list or search:



### Contacts

**Recently Viewed** [dropdown] [refresh]

4 items • Updated a few seconds ago

<input type="checkbox"/>	Name	Account Name
1 <input type="checkbox"/>	<a href="#">Susanna West</a>	
2 <input type="checkbox"/>	<a href="#">Sam West</a>	Susanna West
3 <input type="checkbox"/>	<a href="#">Test Client</a>	
4 <input type="checkbox"/>	<a href="#">Les West</a>	

Scroll down to Income Analysis and click New:

The screenshot shows the Synaptic Pathways interface with the 'Income Analysis' section selected. The 'New' button is highlighted with a red box. The interface includes a top navigation bar, a search bar, and several data tables.

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

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

Protection Name	Description	Created Date
1 <input type="checkbox"/> Protection Quote Test	Test Description Text	23/02/2024, 11:33
2 <input type="checkbox"/> Protection Quote		06/03/2024, 10:22
3 <input type="checkbox"/> Test		07/11/2024, 14:40
4 <input type="checkbox"/> Test!		07/11/2024, 15:41
5 <input type="checkbox"/> Test		11/12/2024, 11:56

Complete New Income Analysis details:

# New Income Analysis

\* = Required Information

## Information

\* Client

\* Goal Name

Description

\* Review Date

Format: 31/12/

February 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

Today

Save & New

Save

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New

on Text

ate

, 11:33

, 10:22

, 14:40

, 15:41

Save

# New Income Analysis

\* = Required Information

## Information

\* Client

\* Goal Name

Description

\* Review Date

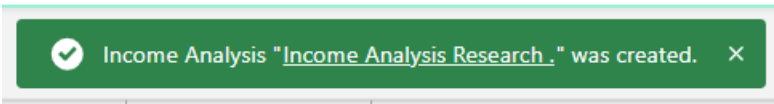
Cancel

Save & New

Save

Save

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



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

**Income Analysis Research**

Client: Susanna West  
Description: Test Description  
Created By: Amy Paulsen, 19/02/2025, 1...

[View All](#)

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

The screenshot shows the 'Goal Details' screen for 'Income Analysis Research'. The client is Susanna West, with a description of 'Test Description' and created by Amy Paulsen on 24/02/2025 at 15:13. The screen is divided into several sections: 'Add Goal Details' with 'Cashflow Start' (Age: 42, Date: 17/09/1982), 'Client Details - Susanna West' (Age: 42, Date of Birth: 17/09/1982), 'Drawdown Start' (Age: 42, Date: 17/09/1982), 'Retirement Start' (Age: 42, Date: 17/09/1982), 'Forecast Life Expectancy' (84), and 'Tax Rate' (Current Tax Rate). A 'What's Shown Here' box explains that these details are used throughout the income analysis. Navigation buttons include '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](#)