

Income Analysis - Joint Life - Annuity

Last Modified on 01/10/2024 12:19 pm BST

This article is a continuation of [Income Analysis - Joint Life - Other Incomes](#)

From Projection

An annuity quote will automatically generate for both clients when clicking into the Annuity tab. This is an Indicative quote based on the projection:

The screenshot displays the 'Income Analysis Research' interface. At the top, it shows the client name 'Susanna West', a description 'Test Description', and the creator 'Amy Paulsen' with a timestamp '01/10/2024, 10:34'. A progress bar indicates the current step is 'Annuity'. Two panels show indicative annuity income: 'Indicative Annuity Income - Susanna West' with a value of £31,440.02 per annum gross, and 'Indicative Annuity Income - Les West' with a value of £12,740.41 per annum gross. Both panels have 'From Projection' selected. An 'Additional Information' box on the right explains that the value is the best available OMO income at that time, which can be overridden if a provider quote is available.

From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

If not complete, enter both client's smoker status and postcode:

Two panels are shown for 'From Provider Quote'. The left panel is for 'Susanna West' and the right for 'Sam West'. Both panels have 'Include Indicative Annuity Income' checked and 'From Provider Quote' selected. Below this, a text box states: 'This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.' Each panel has a 'Client is a smoker' section with 'Yes' and 'No' radio buttons, and a '* Client Postcode' field with a 'Get Quote' button. An 'Overriding Annuity Income' section with an 'Override indicative annuity quote' checkbox is also present at the bottom of each panel.

Click **Get Quote**

Annuity

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

From Projection | From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

Client is a smoker: Yes No * Client Postcode: HD1 6NA [Get Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Indicative Annuity Income - Les West

Include Indicative Annuity Income

From Projection | From Provider Quote

The indicative annuity income as per the projections.

Indicative Annuity Income

£12,740.41 per annum gross.

Overriding Annuity Income

Override indicative annuity quote

A provider quote will be returned.

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

From Projection | From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

Standard Life

Indicative Annuity Income Quote

£27,710.28 per annum gross.

Pension Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Indicative Annuity Income - Les West

Include Indicative Annuity Income

From Projection | From Provider Quote

The indicative annuity income as per the projections.

Indicative Annuity Income

£12,740.41 per annum gross.

Overriding Annuity Income

Override indicative annuity quote

Repeat for the second client:

Income Analysis Research - [Get Illustration](#) [Edit](#) [Delete](#)

Client: Susanna West Description: Test Description Created By: Amy Paulsen, 01/10/2024, 10:34

Results Mark Status as Complete

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

From Projection | From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

Standard Life

Indicative Annuity Income Quote

£27,710.28 per annum gross.

Pension Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Indicative Annuity Income - Les West

Include Indicative Annuity Income

From Projection | From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

SCOTTISH WIDOWS

Indicative Annuity Income Quote

£10,040.40 per annum gross.

Standard Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Additional Information

The value returned will be the best available OMO income at that time. If you already have an annuity quote or you know your client will benefit from an enhanced annuity you can override the indicative standard annuity quote value by using the functionality.

Click **Get Enhanced Annuity Quote** if needed. This will open Synaptic Webline in a new tab.

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

From Projection | From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

Standard Life

Indicative Annuity Income Quote

£27,710.28 per annum gross.

Pension Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Indicative Annuity Income - Les West

Include Indicative Annuity Income

From Projection | From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

SCOTTISH WIDOWS

Indicative Annuity Income Quote

per annum gross.

Standard Annuity

[Get Enhanced Annuity Quote](#)

[Refresh Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Product Details: > **13** Client Questions
 > **10** Product Information
 Client A:
 Client B:

Detailed Quote Form

Client Details

Clients: Life A Include Life B

Title:

Forename:

Surname:

Gender: Male Female Male Female

Date of Birth:

Is a smoker: Yes No Yes No

Marital Status:

Present Occupation:

Full Time: Full time Part time Full time Part time

Previous Occupation:

Date Ceased:

Untick **Include Indicative Annuity Income** if not required.

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income


[Overriding Annuity Income](#)

Override indicative annuity quote

Indicative Annuity Income - Les West

Include Indicative Annuity Income

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.



Indicative Annuity Income Quote

per annum gross.
Standard Annuity

[Overriding Annuity Income](#)

Override indicative annuity quote

Override Annuity Quote

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income


[Overriding Annuity Income](#)

Override indicative annuity quote

Indicative Annuity Income - Les West

Include Indicative Annuity Income

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.



Indicative Annuity Income Quote

per annum gross.
Standard Annuity

[Overriding Annuity Income](#)

Override indicative annuity quote

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

Overriding Annuity Income

Override indicative annuity quote

Please enter the value here if you already have an annuity quote. Your value will override any indicative standard annuity quote value shown in the results and reports generated.

*Amount

Please fill out this field.

*Basis

Indicative Annuity Income - Les West

Include Indicative Annuity Income

From Projection

From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

SCOTTISH WIDOWS

Indicative Annuity Income Quote

per annum gross.
Standard Annuity

Get Enhanced Annuity Quote

Refresh Quote

Overriding Annuity Income

Override indicative annuity quote