

Income Analysis - Joint Life - Advanced Options

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Advanced Options function the same for both single and joint clients.

When doing joint research, you will be able to tweak details of both clients, including all details of the income analysis scenario.

The screenshot shows the 'Income Analysis Research' interface. The 'Illustration Settings & Income' section is active. Under 'Client Details - Susanna West', the 'Forecast Life Expectancy' is set to 83, and 'Liable to Scottish Tax Rules?' is set to 'No'. The 'Income Value' chart shows income components over time, with a red vertical line indicating the 'LIFE EXPECTANCY' at age 83. Summary statistics include: Investment Required to get desired income: £0.00 gross; Maximum Level Income: £65,034.00 per annum net; Indicative Annuity Income: £27,710.28 gross per annum.

The screenshot shows the 'Annuity' section of the 'Income Analysis Research' interface. It displays two indicative annuity quotes from Legal & General. The first quote is for 'Indicative Annuity Income - Susanna West' at £25,969.56 per annum gross. The second quote is for 'Indicative Annuity Income - Les West' at £10,308.72 per annum gross. The 'Income Value' chart is visible in the background, showing the same income components and life expectancy line as the previous screenshot.

For more information about Advanced options, see the following articles:

[Income Analysis - Advanced Options](#)

[Income Analysis - Advanced Options - Creating Scenarios](#)

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

[Income Analysis - Advanced Options - Income Hierarchy](#)

[Income Analysis - Advanced Options - Scenario Editor](#)

[Income Analysis - Advanced Options - Compare](#)

[Income Analysis - Advanced Options - Choosing your selected scenario](#)
