Company Settings - Stress Test

25/02/2025 1:05 pm GMT

When creating scenarios within the Advanced Options area of the Income Analysis journey, you are able to select market event scenarios in the Scenario Editor. These include for e.g. a Global financial crisis', Covid 19 Pandemic and Dot-com bubble. See article - Income Analysis - Advanced Options - Scenario Editor for more information.

You can create your own market event in Configuration>Company Information> Stress Test.

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This area allows you to set a Stress Test that will appear in the Income Analysis module.

Set a Stress Test Name:

Company Settings Stress Test
Set the name and parameters as predefined stress test available within income analysis journey.
*Stress Test Name
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Enter the year you would like the test market event to apply to:

Company Settings Stress Test
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Enter the percentage amount. This will adjust the pot to show the effect of a particular or proposed event on the client's retirement plan.

Company Settings Stress Test
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5
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