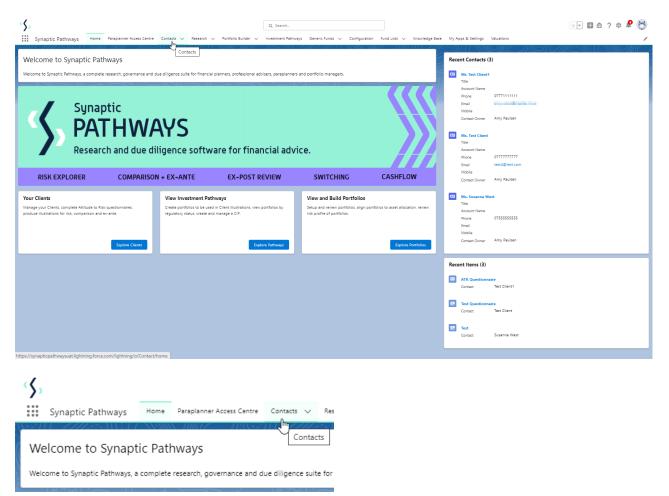
## **Income Analysis - Creating Research**

15/04/2025 4:10 pm BST

Create Income Analysis research through the Contact record.

## Navigate to **Contacts** tab:



Find your client in the list or search:

\$					
***	Syna	ptic Pathways	Home	Paraplanner Access Cen	ntre Contacts 🗸
6 iten		ently Viewed C			nds ago
1		Name 1		~	Account Name
1		Ben Smith			
2		Mike Smith			
3		Steve Test			
4		Test Client			
5		test client account			test client account
6		Test Client1			
		Test Cl	ient1		

Scroll down to Income Analysis and click New:

Gorad Mr. Test Client1 A	+ Follow Edit New Contact New Opportunity V
Related Details Medical Holdings Related Contacts Family AUM	Recent Items (3)
We found no potential duplicates of this Contact.	Contact Test Client1
Client Questionnaires (1) (* * C New 1 here sconds ago	E Test Questionnaire Contact Test Client
Client Questionnaire Name      Complete      Risk Category      Risk Rating      Default      v     Risk Rating      Default      v     Risk Rating      Default      v     Risk Rating      V     Ri	Contact Susanna West
<	Activity Chatter
Risk Illustrations (1)         @ • • Ø New           1 ham + Updated a few accords ago         0	
Illustration Name     V Descriptio      V Target Risk Category     V Term     V Term     V Review Date	Filters: All activities - All syses 🕸 Refresh - Expand All - View All
1 Rick Illustration Moderately Cautious (High End) 10	✓ Upcoming & Overdue
Ver Al	No activities to show. Get started by sending an email, scheduling a task, and more.
Research (0)	No past activity. Past meetings and tasks marked as done show up here.
Dincome Analysis (0)	
Protection (0)         New	
Opportunities (0)	
Cases (0)	

Complete New Income Analysis details and Save

New Income Analysis							
		* = Required Information					
Information							
* Client							
🚥 Susanna West	×						
* Goal Name	5						
Income Analysis Research							
Description	5						
Test Description							
* Review Date	<u>c</u>						
25/04/2025	÷						
* Accumulation / Decumulation							
Decumulation	•						
Cancel Save & New Save In Save							

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

✓ Income Analysis <u>"I</u>	ncome Analysis Re	<u>search"</u> was created	×								
Income Analysis (1) I item • Updated a few seconds ago	Income Analy	vsis Research	Ō								🕸 + C <sup>i</sup> New
Goal Name	Client Name	Description	Гуре 🚿	Hol	dings	$\sim$	Fund Value	$\sim$	Income So 🗸	Review Date	
1 Income Analysis Research	Test Client Test Description Created By Amy Paulsen, 05/10/2023, 10:54									19/10/2024	
< V											•
		View All									

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

Cite W       Desk       Desk       Desk       Annaly       Control         Control       Pers       Income Requirements       Desk       Annaly       Resk       Med Sola on Complete         Control       Pers       Income Requirements       Desk       Annaly       Resk       Med Sola on Complete         Control       Pers       Income Requirements       Desk formation       Resk       Med Sola on Complete         Control       Pers       Income Requirements       Desk formation       Resk       Med Sola on Complete         Control       Desk formation       Pers       Income Requirements       Desk formation       Resk formation       Med Sola on Complete         Control       Desk formation       Desk formation       Desk formation       Desk formation       Resk formation       <	Synaptic Pathways Home Persplanner Access Centre Contacts v Research v Portfolio Builder C Income Analysis Income Analysis Research.	Q. Search  Investment Pathways Generic Funds v Configuration Fund Lists v	✓ Knowledge Base My Apps & Settings Va	luations Reports V Income Analysis R	escarch V X More V A
Add Code Details   Add Code Details   Age   Age   Age   Age   Age   Details   Susana Wett   Age   Age   Age   Details   Details   Details   Age   Details   Details </td <td>Susanna West Test Description 🛗 Amy Paulsen, 20/02/2025, 13:51</td> <th>e Requirements Other Incomes</th> <td>Annuity</td> <td>Results</td> <td>✓ Mark Status as Complete</td>	Susanna West Test Description 🛗 Amy Paulsen, 20/02/2025, 13:51	e Requirements Other Incomes	Annuity	Results	✓ Mark Status as Complete
	Califore Stat ye Dea Control Stat Age Des 1:00/VB2 Clerct Details - Susanna West Age Des 1:00/VB2 Clerct Details - Susanna West Age Des 1:00/VB2 Des 1:00/VB2 D			These details will be used throughout the in	

For further information on Income Analysis research, see article Income Analysis - Add Goal Details

If you would like to complete joint life research, see article Income Analysis - Joint Life - Create Research