

# Income Analysis - Add Goal Details

21/02/2025 10:49 am GMT

This article is a continuation of [Income Analysis - Creating Research](#)

If you are looking to complete joint life research, see article [Income Analysis - Joint Life - Create Research](#)

Complete the **Add Goal Details** screen. These details will be used throughout the research to provide a picture of how long the fund will last against a given income requirement:

The screenshot shows the 'Add Goal Details' screen in the Income Analysis software. The interface includes a navigation bar at the top with various menu items like 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', etc. The main content area is titled 'Income Analysis Research..' and contains several sections for data entry. The 'Add Goal Details' section has fields for 'Cashflow Start' (Age/Date), 'Drawdown Start' (Age/Date), 'Retirement Start' (Age/Date), 'Forecast Life Expectancy' (84), 'Liable to Scottish Tax Rules?' (Yes/No), and 'Tax Rate' (Current and At Retirement). The 'Client Details - Susanna West' section shows 'Age' (42) and 'Date of Birth' (17/09/1982). The 'Client Details - Second Client' section has a '+ Add Second Client' button. A 'What's Shown Here' box on the right explains that these details will be used throughout the income analysis. At the bottom, there are 'Cancel', 'Continue to Result Page', and 'Continue to Next Step' buttons.

**Cashflow Start Age** – This information can be either an age or a date that you would like the drawdown scenario to start.

**Drawdown Start Age** - Age/Date the client goes into Drawdown. This will default to the Cashflow start age for Client 1. If doing joint research, you can set an age/date they go into drawdown.

**Retirement Start Age** - Age/Date the client starts Retirement. This field is not used in calculations, but will appear on the report.

**Forecast Life Expectancy** – This figure is pre calculated utilising ONS statistics, it is determined from the clients DOB and gender. If required this figure can be overridden.

**Scottish Tax Rules** – This option allows you to toggle whether the system uses Scottish Tax rules or not. This determines which tax bandings are applied within the calculations.

**Tax Rate** - Capture the client's Current Tax Rate and At Retirement Tax Rate

Once complete, **Continue to Next Step:**

Income Analysis Research... Get Illustration Edit Delete

Goal Details Plans Income Requirements Other Incomes Annuity Results Mark Status as Complete

#### Add Goal Details

Cashflow Start \* Cashflow Start Age  
     
Date: 17/09/2047

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#### Client Details - Susanna West

Age  Date of Birth   
Date: 17/09/2047

Drawdown Start \* Drawdown Start Age  
     
Date: 17/09/2047

Retirement Start \* Retirement Start Age  
     
Date: 17/09/2047

\* Forecast Life Expectancy

Liable to Scottish Tax Rules?

Tax Rate  
 Current Tax Rate   
 At Retirement Tax Rate

#### Client Details - Second Client

#### What's Shown Here

These details will be used throughout the income analysis to provide a picture of how long the fund will last against a given income requirement.

Cancel Continue to Result Page Continue to Next Step

For further information on Income Analysis research, see article [Income Analysis - Plans](#)