

Income Analysis - Add Goal Details

27/02/2025 11:30 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 displays the 'Add Goal Details' interface. It features a top navigation bar with a search field and various menu items. Below the navigation bar, there are tabs for 'Goal Details', 'Plans', 'Income Requirements', 'Other Incomes', 'Annuity', and 'Results'. The 'Add Goal Details' section is active, showing several input fields: 'Cashflow Start' with 'Age' and 'Date' buttons; 'Client Details - Susanna West' with 'Age' (42) and 'Date of Birth' (17/09/1982); 'Drawdown Start' with 'Age' and 'Date' buttons; 'Retirement Start' with 'Age' and 'Date' buttons; 'Forecast Life Expectancy' (84); 'Liable to Scottish Tax Rules?' (Yes/No); and 'Tax Rate' (Current and At Retirement). A 'What's Shown Here' box on the right states: '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.' At the bottom, there are buttons for 'Cancel', 'Continue to Result Page', and 'Continue to Next Step'.

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
Age: 65 Date: 17/09/2047

Client Details - Susanna West

Age: 42 Date of Birth: 17/09/1982

Drawdown Start * Drawdown Start Age
Age: 65 Date: 17/09/2047

Retirement Start * Retirement Start Age
Age: 65 Date: 17/09/2047

* Forecast Life Expectancy
64

Liability to Scottish Tax Rules? Yes No

Tax Rate
Current Tax Rate: 20.00%
At Retirement Tax Rate: 20.00%

Client Details - Second Client
[+ Add 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](#)