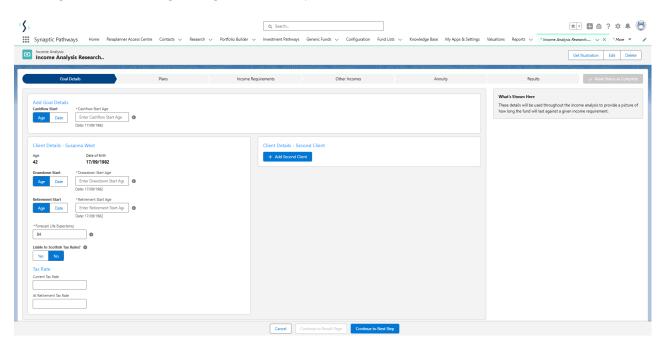
Income Analysis - Add Goal Details

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:



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:

Conte Analysis Income Analysis Research.			
God Details Plans Income	Requirements Other Incomes	Annuity	Results V Mark Status as Complete
Add Goal Details Cabihow Start *Cabihow Start Age 65 Date 1709/2047			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.
Client Details - Susanna West Age Date of Birth 42 11/09/1992	Client Details - Second Client + Add Second Client		
Brawdown Start * Drawdown Start Age 55 Date: 17/08/2047			
Retirementi Start * Retirementi Start Age 65 65 Date 17/09/2047			
*forecast Life Expectancy 4 Libble to Scottish Tax Rules?			
Ves No Tax Rate			
Current Tax Rate 20.00% At Retirement Tax Rate			
20.07%	Cancel Continue to Result Page Continue to Next	See 1	

For further information on Income Analysis research, see article Income Analysis - Plans