

Income Analysis - Other Incomes

Last Modified on 04/10/2024 3:08 pm BST

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

The Other Incomes area allows you to complete State Pension information and any other income to include in the analysis.

State Pension

Income Analysis Research

Client Name: Susanna West | Description: Test Description | Created By: Amy Paulsen, 02/08/2024, 10:43

Progress: Other Incomes (Active), Annuity, Results

State Pension

Include State Pension in the Calculation Yes No

State Pension Age

*Years: 68 | *Months: 0 | *Yearly Income: 11502.4

Include additional State Pension in the Calculation Yes No

Other Income to be Included

What's Shown Here

Please enter client's State pension to be included in the calculation including additional State pension. Add any other income to be included in the analysis. It is important to indicate whether the income is taxable for accurate calculations.

Refer to the gov.uk website to check entitlement.
<https://www.gov.uk/state-pension/eligibility>

Buttons: Back, Continue to Result Page, Continue to Next Step

State Pension is automatically selected and values entered from the Gov.uk website.

These figures can be overridden:

State Pension

Include State Pension in the Calculation Yes No

State Pension Age

*Years: 68 | *Months: 0 | *Yearly Income: 11502.4

Include additional State Pension in the Calculation Yes No

Additional state pension can be added:

State Pension

Include State Pension in the Calculation Yes No

State Pension Age

*Years: 68 | *Months: 0 | *Yearly Income: 11502.4

Include additional State Pension in the Calculation Yes No

Complete details of the additional pension. This will be taken into account in the results:


Include additional State Pension in the Calculation ⓘ

*Annual Amount:
 *Indexation:
 Indexation Rate %:

Other Income to be included

Click **Add**:

Other Income to be Included



Complete details of the **Other Income** and **Save**:

Add Other Income

ⓘ Please add any other income to be included in the analysis. It is important to indicate whether the income is taxable for accurate calculations.

*Income Name:
 *Date From:
 *Age To:

*Frequency:
 *Frequency Type:
 *Amount (Gross):

*Indexation:
 Indexation Rate %:
 *Taxable:

*Product Category:
 Other Product Category:

Additional other incomes can be added.

Other Income to be Included

Name	Start Date	Age To	Frequency	Frequency Type	Amount (Gross)	Indexat...	Taxable	Product Category	Included
Buy to Let	2024-08-02	75	Monthly	Advance	£1,000.00		Yes	Property	<input checked="" type="checkbox"/>

ⓘ Please add any other income to be included in the analysis. It is important to indicate whether the income is taxable for accurate calculations.

For further information on Income Analysis research, see article [Income Analysis - Results](#). If doing a Phased Drawdown scenario, view article [Income Analysis - Phased Period](#)