

Income Analysis - Other Incomes

Last Modified on 16/12/2024 12:38 pm GMT

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

Yes No

*Annual Amount *Indexation Indexation Rate %

Other Income to be included

Click **Add**:

Other Income to be Included **+ Add**

Add Other Incomes

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

Edit 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 *Taken Monthly *Amount (Gross)

*Indexation Indexation Rate % *Taxable

*Product Category Other Product Category

Once saved, you can enter details of how the income will be used in the event of excess income:

Other Income to be Included **+ Add**

Name	Client	Start Date	Age To	Frequency	Taken ...	Amount (Gross)	Taxable	Product Category	Included
Buy to let	Susanna West	9 Dec 2024	72	Monthly	Yes	£1,500.00	Yes	Property	<input checked="" type="checkbox"/>

In the event of excess income, this income will be used to...

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

Additional other incomes can be added.

Other Income to be Included + Add

Name	Client	Start Date	Age To	Frequency	Taken ...	Amount (Gross)	Taxable	Product Category	Included
Buy to let	Susanna West	9 Dec 2024	72	Monthly	Yes	£1,500.00	Yes	Property	<input checked="" type="checkbox"/>


In the event of excess income, this income will be used to...

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

Savings Accounts to be included

Click **Add+**

Saving Accounts to be Included + Add



Please add any other saving accounts to be included in the analysis.

Add Saving Account

Back
Continue to Result Page
Continue to Next Step

Complete details of the **Savings Account**.

Enter a **Threshold**, the system will no longer withdraw from the Savings account when it hits the threshold.

Save.

Edit Saving Account

*Income Name
Savings Account

*Amount (Gross) £59,642.00 *Interest Rate 5.00% *Threshold £50,000.00

Cancel
Save

Saving Accounts to be Included + Add

Name	Client	Amount (Gross)	Interest Rate	Threshold
Savings Account	Susanna West	£59,642.00	5%	£50,000.00

Please add any other saving accounts to be included in the analysis.

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