

Income Analysis - Results

15/04/2025 4:28 pm BST

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

Once you have completed the **Annuity** area, **Continue to Next Step:**

Income Analysis

Income Analysis Research

Get Illustration

Edit

Delete

Client

Susanna West

Description

Test Description

Created By

Amy Paulsen

15/04/2025, 16:10

✓

✓

✓

✓

✓

Annuity

Results

Mark Status as Complete

Indicative Annuity Income - Susanna West

☒ Include Indicative Annuity Income

From Projection

From Provider Quote

This is the best available Open Market Option annuity income obtained from the panel of annuity providers available.

Standard Life

Indicative Annuity Income Quote

£102,635.76

per annum gross.

Pension Annuity

Get Enhanced Annuity Quote

Overriding Annuity Income

☐ Override indicative annuity quote

Additional Information

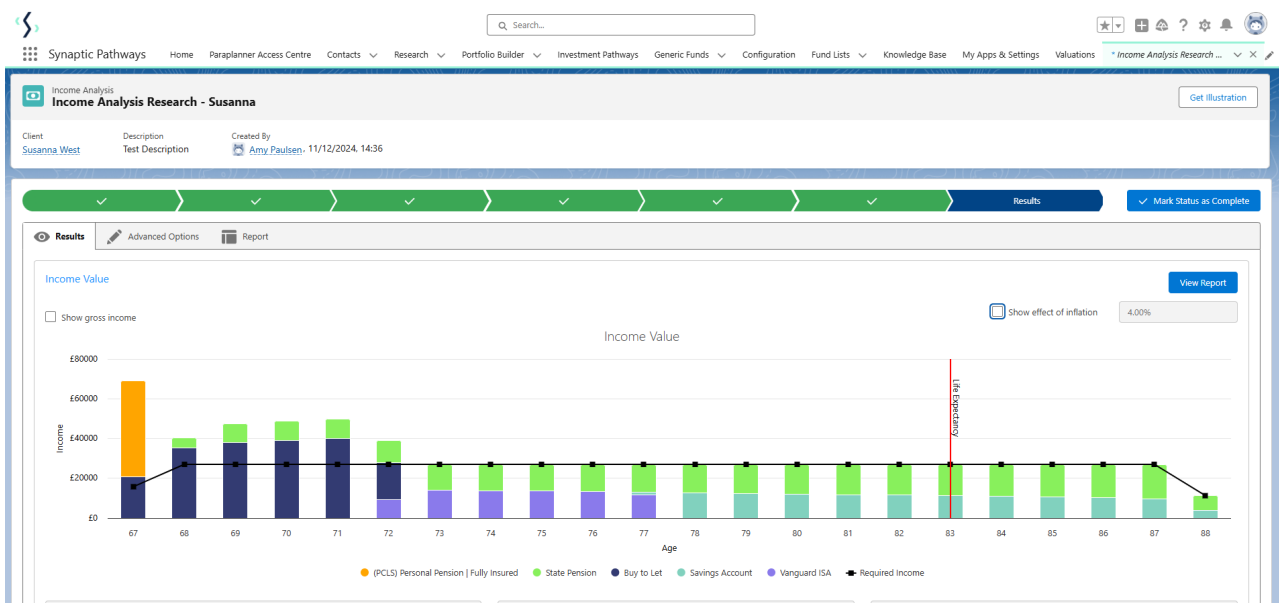
The value returned will be the best available OMO income at that time. If you already have an annuity quote or you know your client will benefit from an enhanced annuity you can override the Indicative standard annuity quote value by using the functionality.

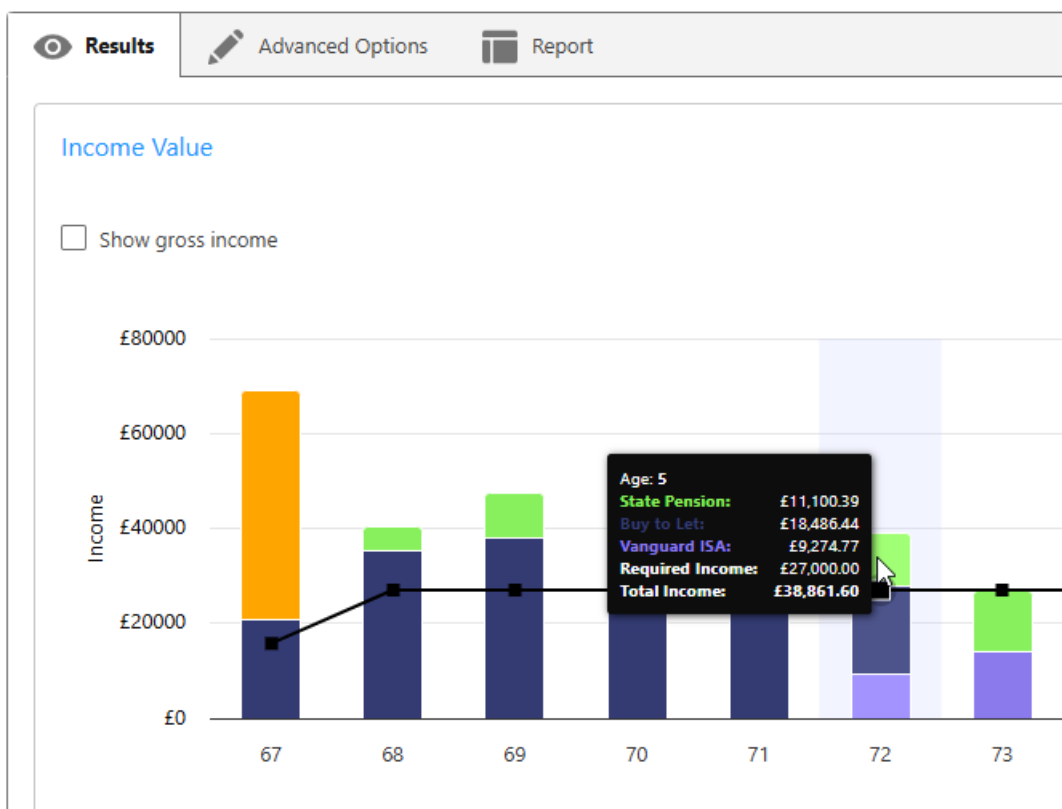
The Results screen will load, showing an Income Value Graph.

The graph at the top of the page shows if the income requirement has been met for each year of the goal. Each bar is comprised of the income components that make up the income for that year.

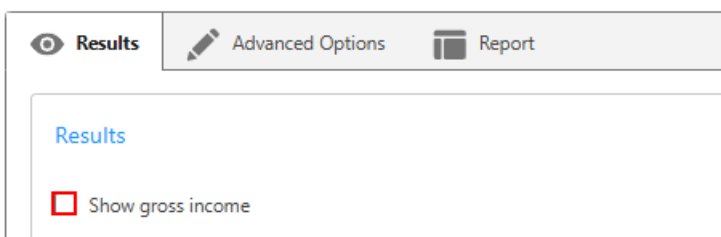
Hovering over the bar for a particular year will display the values for that year.

The income requirements are input into the system as a net figure, the system then determines how much will need to be withdrawn from the drawdown fund to satisfy the net income requirement, factoring in other income and tax that would be paid.





The graph can be toggled so that it shows the gross figures rather than the net position



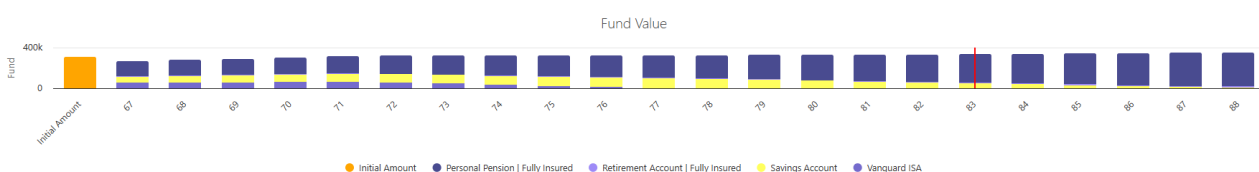
Beneath the income graph there are information boxes.

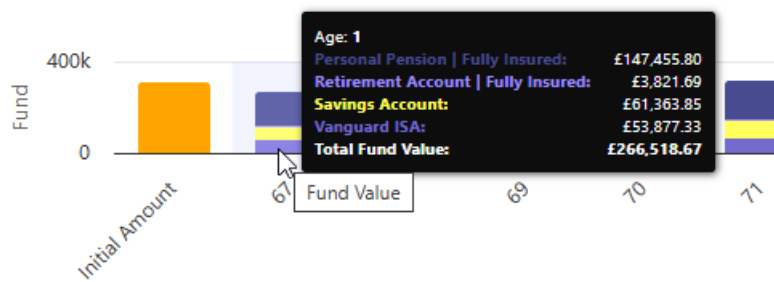
Investment required to get desired income – this box displays values when the income profile has not been achieved for the duration. The figure displayed shows the extra investment required to reach the desired income level.

Maximum level income – this shows you how much income is achievable on a level basis. If the income requirement is set to this figure, the drawdown plan will aim to reach a final value of zero by the time the scenario ends.

Investment Required to get desired income ⓘ £0.00 gross <small>£0.00 for 321 months</small>	Maximum Level Income ⓘ £44,755.00 <small>per annum net</small>	Indicative Annuity Income ⓘ £17,941.14 <small>gross per annum</small>
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The second graph displayed is the **Fund Value** graph.





The fund value graph displays how much remains in the fund each year until the end of the goal. Hovering over any of the bars will display the fund value at the end of that year.

The third graph is a Stochastic Income Projection graph.

This shows the % chance of achieving the final investment value over a term.



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