

Income Analysis - Annuity

Last Modified on 02/08/2024 2:10 pm BST

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

From Projection

An annuity quote will automatically generate when clicking into the Annuity tab. This is an Indicative quote based on the projection:

The screenshot shows the 'Income Analysis Research' interface. At the top, there is a navigation menu with options like Synaptic Pathways, Home, Paraplanner Access Centre, etc. The main header includes 'Income Analysis Research' and buttons for 'Get Illustration', 'Edit', and 'Delete'. Below the header, client details for 'Susanna West' are shown. A progress bar indicates the current step is 'Annuity'. The main content area has two sections: 'Indicative Annuity Income' and 'Overriding Annuity Income'. In the 'Indicative Annuity Income' section, the 'From Projection' button is selected, and the value is £73,407.92 per annum gross. An 'Additional Information' box on the right explains that the value is the best available OMO income. At the bottom, there are 'Back', 'Continue to Result Page', and 'Continue to Next Step' buttons.

From Provider Quote

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

The screenshot shows the 'Income Analysis April24' interface. The layout is similar to the previous one, but the 'From Provider Quote' button is selected in the 'Indicative Annuity Income' section. The value displayed is £55,957.32 per annum gross, attributed to 'SCOTTISH WIDOWS'. A 'Get Enhanced Annuity Quote' button is visible next to the value. The 'Additional Information' box on the right remains the same. The bottom navigation buttons are also present.

Click **Get Enhanced Annuity Quote** if needed. This will open Synaptic Weblene in a new tab.

Indicative Annuity Income

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.

SCOTTISH WIDOWS Indicative Annuity Income Quote (highest per annum gross return)

£55,957.32

Standard Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Product Details: > **13** Client Questions
- **10** Product Information
Client A:
Client B:

Detailed Quote Form

Client Details

Include Life B

Clients	Life A	
Title	<input type="text"/>	<input type="text"/>
Forename	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Gender	<input type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female
Date of Birth	<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>
Is a smoker	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Marital Status	<input type="text" value="Please choose"/>	<input type="text" value="Please choose"/>
Present Occupation	<input type="text"/>	<input type="text"/>
FullTime	<input type="radio"/> FullTime <input type="radio"/> PartTime	<input type="radio"/> FullTime <input type="radio"/> PartTime
Previous Occupation	<input type="text"/>	<input type="text"/>

Untick **Include Indicative Annuity Income** if not required.

Indicative Annuity Income

Include Indicative Annuity Income

[From Projection](#) [From Provider Quote](#)

The indicative annuity income as per the projections.

Indicative Annuity Income

£76,718.07 per annum gross.

Overriding Annuity Income

Override indicative annuity quote

Income Analysis
Test Income Analysis 1

Comparison with En-Acte
Edit
Delete

Client Name Susanna West	Description Test Description	Created By Amy Paulsen, 05/10/2023, 12:31
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Indicative Annuity Income
 Include Indicative Annuity Income

Additional Information
The value returned will be the best available QMID 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.

Override Annuity Quote

Overriding Annuity Income

Override indicative annuity quote

Overriding Annuity Income

Override indicative annuity quote

Please enter the value here if you already have an annuity quote. Your value will override any indicative standard annuity quote value shown in the results and reports generated.

* Amount	* Basis
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