

Income Analysis - Annuity

21/02/2025 3:06 pm GMT

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. The 'Annuity' tab is active, and the 'From Projection' option is selected. The main content area displays the following information:

- Indicative Annuity Income - Susanna West**
- Include Indicative Annuity Income
- Buttons: [From Projection](#) (selected), [From Provider Quote](#)
- Text: "This is the best available Open Market Option annuity income obtained from the panel of annuity providers available."
- Quote: **SCOTTISH WIDOWS** Indicative Annuity Income Quote: **£51,286.32** per annum gross. Standard Annuity
- Buttons: [Get Enhanced Annuity Quote](#)
- Section: **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.

Navigation: [Back](#), [Continue to Result Page](#), [Continue to Next Step](#)

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 Research' interface. The 'Annuity' tab is active, and the 'From Provider Quote' option is selected. The main content area displays the following information:

- Indicative Annuity Income - Susanna West**
- Include Indicative Annuity Income
- Buttons: [From Projection](#), [From Provider Quote](#) (selected)
- Text: "The indicative annuity income as per the projections."
- Quote: **Indicative Annuity Income**: **£57,787.85** per annum gross.
- Section: **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.

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

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

£72,278.16 per annum gross.

Pension Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

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

Detailed Quote Form

Client Details

Clients	Life A	Include Life B
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 - 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

£72,278.16 per annum gross.

Pension Annuity

[Get Enhanced Annuity Quote](#)

Overriding Annuity Income

Override indicative annuity quote

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

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Override indicative annuity quote

Override Annuity Quote

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

Overriding Annuity Income

Override indicative annuity quote

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

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

Enter the Amount and Basis:

Income Analysis
test income Dec Get Illustration Edit Delete

Client: Susanna West | Description: Test Description | Created By: Amy Paulsen, 09/12/2024, 12:37

Progress: [Steps 1-5] Annuity [Step 6] Results [Step 7] Mark Status as Complete

Indicative Annuity Income - Susanna West

Include Indicative Annuity Income

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

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.

Back Continue to Result Page Continue to Next Step

Continue to Next Step

[Continue to Next Step](#)