

# Income Analysis - Advanced Options - Creating Scenarios

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

Add a new scenario by selecting + New

The screenshot shows the 'Income Analysis' software interface. The 'Advanced Options' tab is active. In the 'Scenarios' section, the dropdown menu is set to 'Baseline (Selected)'. A red box highlights the '+ New' button. The 'Results' section displays an 'Income Value' chart with a vertical line for 'Client Life Expectancy' at age 84. The 'Income Requirements' section shows 'Level Income' and 'Profiled Income' options.

Name the new scenario and click OK

The screenshot shows the 'Create New Scenario' dialog box. The title is 'Scenario Name'. The input field contains 'Test Scenario 1'. There are 'Cancel' and 'OK' buttons.

This will copy the original scenarios details, ready to modify.

The screenshot shows the 'Income Analysis' software interface. The 'Advanced Options' tab is active. In the 'Scenarios' section, the dropdown menu is now set to 'Test Scenario 1 (Selected)'. The 'Results' section displays the 'Income Value' chart with the 'Client Life Expectancy' line at age 84. The 'Income Requirements' section shows 'Level Income' and 'Profiled Income' options.

Change any input made in the Income analysis journey:

- Goal Details
- Charges
- Plans
- Other Incomes
- Savings Accounts
- Income Requirements
- Annuity
- Income Hierarchy
- Scenario Editor

The screenshot displays the 'Income Analysis Research' interface. At the top, it shows the client name 'Susanna West', description 'Test Description', and creation details by 'Amy Paulsen' on '20/02/2025, 13:51'. The interface is divided into several sections:

- Illustration Settings & Income:** Contains 'Goal Details' with 'Cashflow Start' (Age: 67, Date: 17/09/2049) and 'Drawdown Start' (Age: 67, Date: 17/09/2049). It also includes 'Client Details - Susanna West' (Age: 42, Date of Birth: 17/09/1982) and 'Forecast Life Expectancy' (Age: 84). There are options for 'Plans', 'Other Incomes', and 'Saving Accounts'.
- Results:** Features a 'Scenarios' dropdown set to 'Test Scenario 1 (Selected)' with '+ New' and 'Compare' buttons. It includes two charts: 'Income Value' (Y-axis: £0 to £120,000) and 'Fund Value' (Y-axis: 0 to 1000k). Both charts show a vertical red line for 'Client Life Expectancy' at age 84. The 'Income Value' chart shows various income sources like PCLS, State Pension, and Vanguard ISA. The 'Fund Value' chart shows the 'Initial Amount' and contributions from various sources.
- Income Requirements:** Lists 'Income Requirements' with 'Income Type' set to 'Level Income'. It includes 'Regular Income Amounts' for 'Living Expenses - Age 67 - Age 79' (Monthly, £1,500.00) and 'Living Expenses - Age 79 - Age 83' (Monthly, £1,800.00). It also shows 'Single Income Amounts' for 'One Off Cost- Age 68' (Single, £2,000.00). There is an 'Annuity' section below.
- Income Hierarchy:** Allows enabling 'Custom withdrawal order' and lists assets for withdrawal: Vanguard ISA, Flexible Transitions Account (LV= Core Funds) Fully Insured, and Personal Pension (TEST) Fully Insured.
- Scenario Editor:** Includes a 'Stock Scenarios' dropdown, 'Year to Apply Scenario' (0-17), and a 'Pot Adjustment' slider. A message states 'No pot adjustment will be made'.

At the bottom of the interface, there is a 'Back' button.

Additional scenarios can be created through the + New button.

Scenarios

Test Scenario 1 (Selected) [Delete] [New] [Compare]

View the additional scenarios through the dropdown:

Scenarios

Test Scenario 1 (Selected) [Delete] [New] [Compare]

Baseline

✓ Test Scenario 1 (Selected)

Show gross income  Show effect of inflation 0.00%

See next article [Income Analysis - Advanced Options - Editing Scenarios](#)

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