Income Analysis - Advanced Options - Creating Scenarios

01/04/2025 1:48 pm BST

This article is a continuation of Income Analysis - Advanced Options

Add a new scenario by selecting + New

Income Analysis Income Analysis Research		Get Illustration Edit Delete
Client Description Created By Susanna West Test Description Marken, 20/02/2025, 1	51	
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Results Advanced Options Report		
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Name the new scenario and click $\mathbf{O}\mathbf{K}$

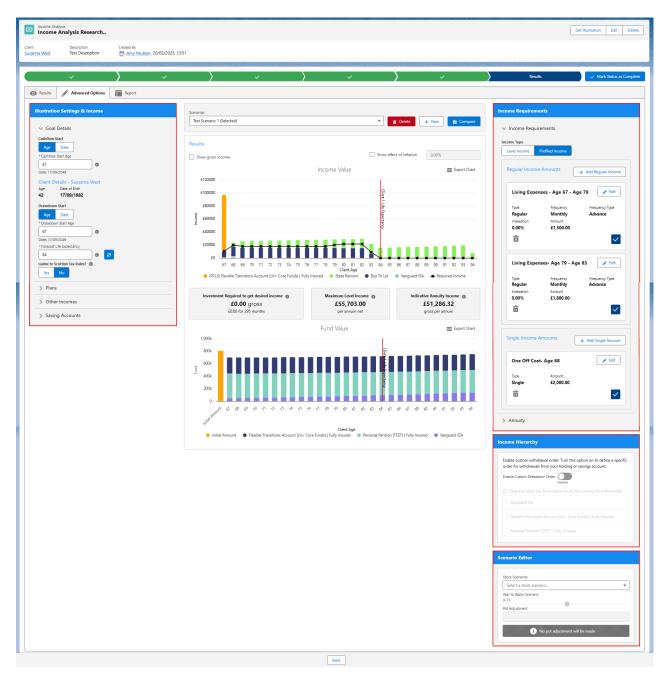
Cancel OK

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

~ >	\checkmark \rangle \checkmark	\rangle \checkmark	> ~	Results 🗸 🗸 Mark Status as Com
Results Advanced Options Report				
Illustration Settings & Income	Scenarios			Income Requirements
✓ Goal Details	Test Scenario 1 (Selected)	▼	Belete + New 🗃 Compare	✓ Income Requirements
Cashflow Start Age Date	Results			Income Type Level Income Profiled Income
Cashflow Start Age 67	Show gross income	Show effec		Annual Income Amount £
Date: 17/09/2049 Client Details - Susanna West	£150000	Income Value	Export Chart	£30,000.00
Age Date of Birth 42 17/09/1982		Cier		> Annuity
Drawdown Start Age Date	£100000 Ê	1 Life Er		Income Hierarchy
Drawdown Start Age	<u>E</u> £50000	as tang		Enable custom withdrawal order: Turn this option on to define a specific
ate: 17/09/2049 Forecast Life Expectancy	f0			order for withdrawals from your holding or savings account. Enable Custom Drawdown Order
84 0 22 iable to Scottish Tax Rules? 0	67 68 69 70 71 72 73	74 75 76 77 78 79 80 81 82 83 84 85 Client Age	86 87 88 89 90 91 92 93 94	Inactive O Drag and drop the items below to set the priority for withdrawals.
Yes No	 (PCLS) Flexible Transitions Account (LV= Buy To Let Vanguard ISA 	: Core Funds) Fully Insured Flexible Transitions Account (L) Required Income	V= Core Funds) Fully Insured	: Vanguard ISA
> Plans				Flexible Transitions Account (LV= Core Funds) Fully Insured

Change any input made in the Income analysis journey:

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



Additional scenarios can be created through the **+ New** button.

Scenarios	
Test Scenario 1 (Selected)	The Delete The Compare

View the additional scenarios through the dropdown:

Scenarios	
Test Scenario 1 (Selected)	💼 Delete 🕂 New 🔚 Compare
Baseline	
✓ Test Scenario 1 (Selected)	
Show gross income	w effect of inflation 0.00%

See next article Income Analysis - Advanced Options - Editing Scenarios