

# Income Analysis - Advanced Options - Editing Scenarios

01/04/2025 1:57 pm BST

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

Once new scenarios has been created, you can amend the inputs and compare them against each other.

In the example below, I will create three scenarios in addition to the original scenario:

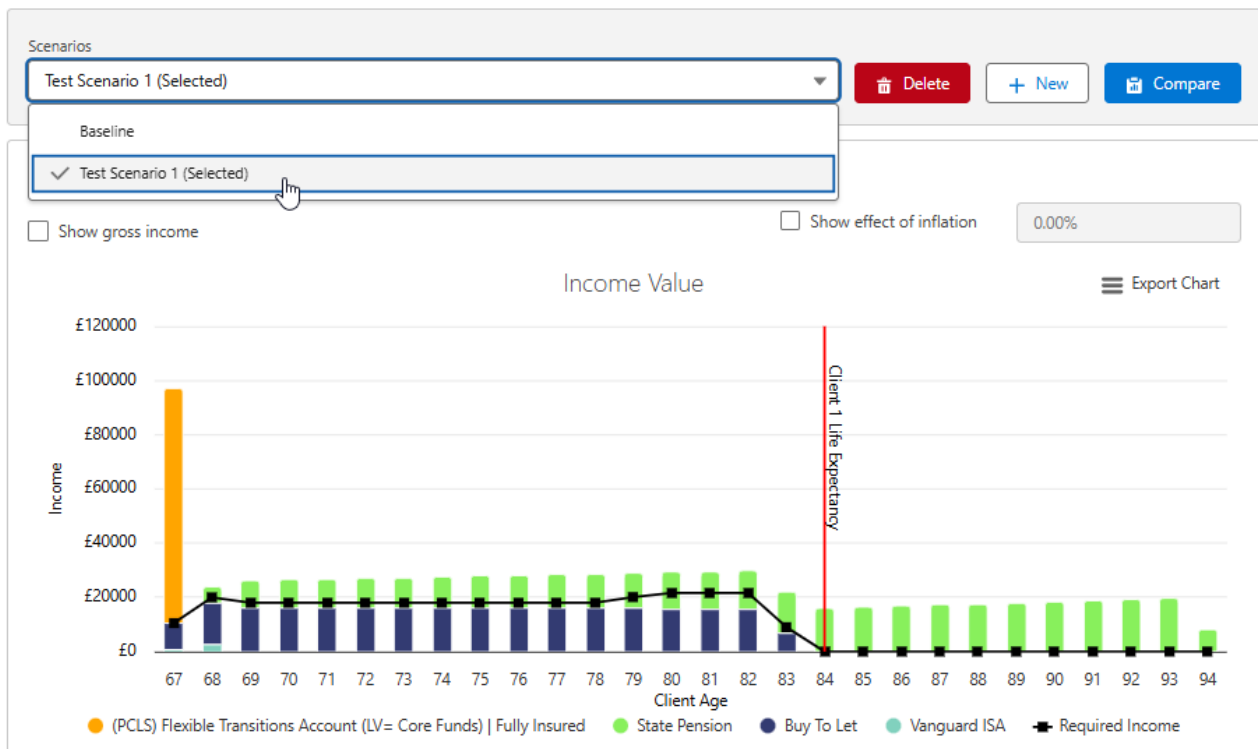
*Test Scenario 1 - Longer term, Forecast Life Expectancy 90years.*

*Test Scenario 2 - Higher Income Requirements, £2000 per month up to 79years.*

*Test Scenario 3 - Remove Buy to Let Other Income*

## Test Scenario 1

Ensure Test Scenario 1 is selected in the dropdown:



In the **Goal Details** area on the left side of the screen, change the **Forecast Life Expectancy** to 90years

Results | Mark Status as Complete

Results | Advanced Options | Report

### Illustration Settings & Income

Goal Details

Cashflow Start  
 Age: 67  
 Date: 17/09/2049

Client Details - Susanna West  
 Age: 42  
 Date of Birth: 17/09/1982

Drawdown Start  
 Age: 67  
 Date: 17/09/2049

\*Forecast Life Expectancy: 84

Liable to Scottish Tax Rules? Yes No

Plans

Scenarios: Test Scenario 1 (Selected) | Delete | + New | Compare

Results

Show gross income:  Show effect of inflation: 0.00%

Income Value

Legend: (PCLS) Flexible Transitions Account (Iv= Core Funds) Fully Insured, State Pension, Buy To Let, Vanguard ISA, Required Income

### Income Requirements

Income Type: Level Income | Profited Income

Regular Income Amounts | + Add Regular Income

Living Expenses - Age 67 - Age 79 | Edit

Type	Frequency	Frequency Type
Regular	Monthly	Advance
Indication	Amount	
0.00%	£1,500.00	

Living Expenses - Age 79 - Age 83 | Edit

Type	Frequency	Frequency Type
Regular	Monthly	Advance

Illustration Settings & Income

Goal Details

Cashflow Start  
 Age: 67  
 Date: 17/09/2049

Client Details - Susanna West  
 Age: 42  
 Date of Birth: 17/09/1982

Drawdown Start  
 Age: 67  
 Date: 17/09/2049

\*Forecast Life Expectancy: 90

Liable to Scottish Tax Rules? Yes No

Plans

Scenarios: Test Scenario 1 (Selected) | Delete | + New | Compare

Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph | Update | Revert

Results

Show gross income:  Show effect of inflation: 0.00%

Income Value

Legend: (PCLS) Flexible Transitions Account (Iv= Core Funds) Fully Insured, State Pension, Buy To Let, Vanguard ISA, Required Income

### Income Requirements

Income Type: Level Income | Profited Income

Regular Income Amounts | + Add Regular Income

Living Expenses - Age 67 - Age 79 | Edit

Type	Frequency	Frequency Type
Regular	Monthly	Advance
Indication	Amount	
0.00%	£1,500.00	

Living Expenses - Age 79 - Age 83 | Edit

Type	Frequency	Frequency Type
Regular	Monthly	Advance

Click Update

Results | Mark Status as Complete

Results | Advanced Options | Report

### Illustration Settings & Income

Goal Details

Cashflow Start  
 Age: 67  
 Date: 17/09/2049

Client Details - Susanna West  
 Age: 42  
 Date of Birth: 17/09/1982

Drawdown Start  
 Age: 67  
 Date: 17/09/2049

\*Forecast Life Expectancy: 90

Liable to Scottish Tax Rules? Yes No

Plans

Scenarios: Test Scenario 1 (Selected) | Delete | + New | Compare

Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph | Update | Revert

Results

Show gross income:  Show effect of inflation: 0.00%

Income Value

Legend: (PCLS) Flexible Transitions Account (Iv= Core Funds) Fully Insured, State Pension, Buy To Let, Vanguard ISA, Required Income

### Income Requirements

Income Type: Level Income | Profited Income

Regular Income Amounts | + Add Regular Income

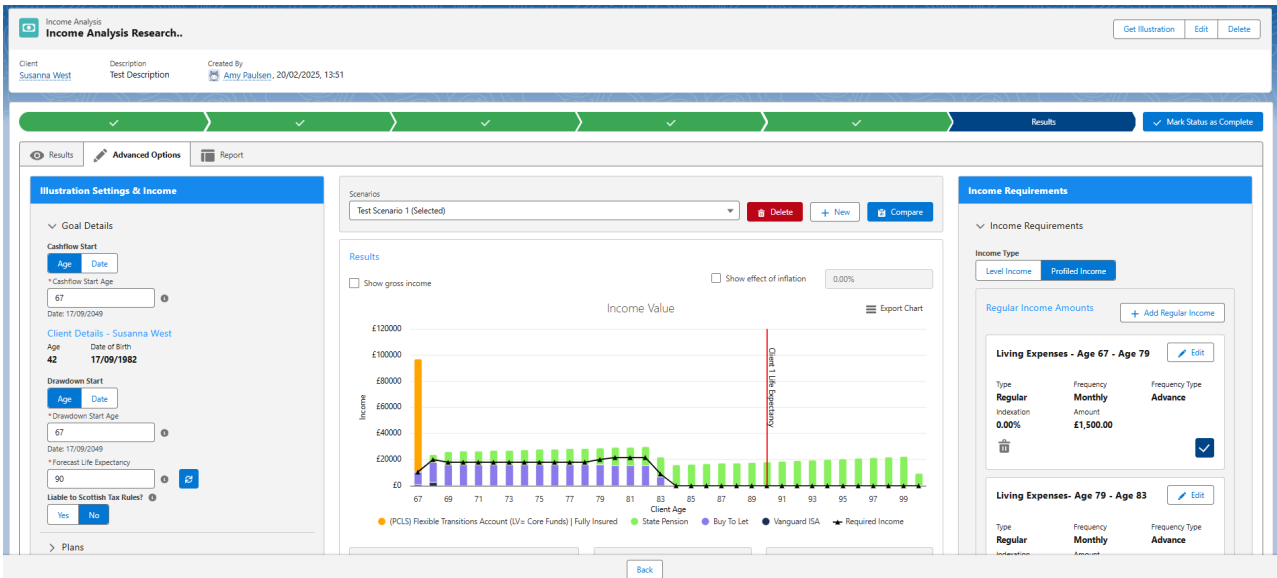
Living Expenses - Age 67 - Age 79 | Edit

Type	Frequency	Frequency Type
Regular	Monthly	Advance
Indication	Amount	
0.00%	£1,500.00	

Living Expenses - Age 79 - Age 83 | Edit

Type	Frequency	Frequency Type
Regular	Monthly	Advance

The results have updated.

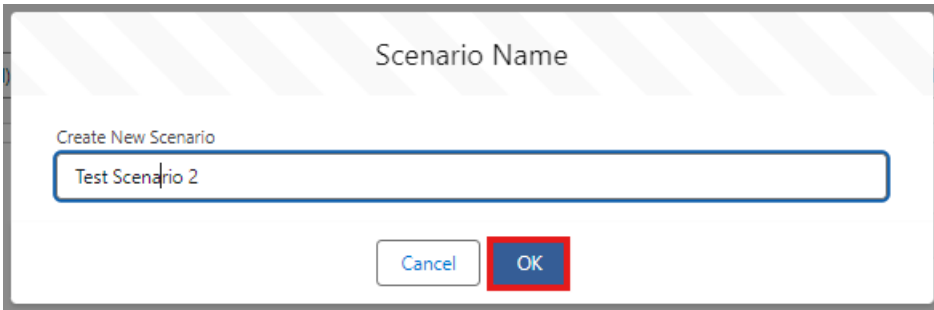


## Test Scenario 2

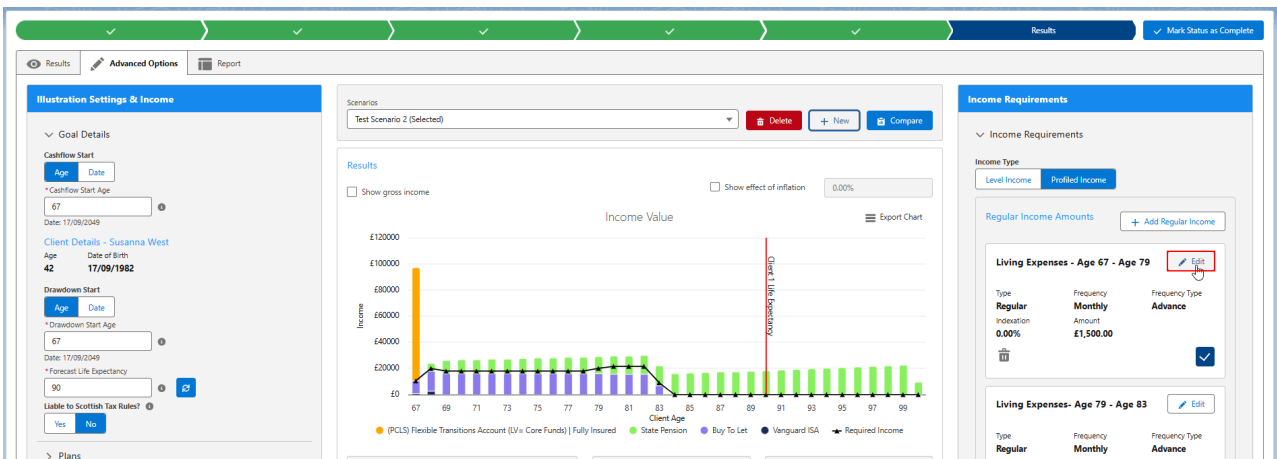
Add additional scenarios through the + New button:



Name the second scenario and click OK



Click the **Edit** button next to the income requirement you would like to amend:



Amend the **Amount & Save**

### Edit Regular Amount

\*Name: Living Expenses

Choose Start: Age 67

Choose End: Age 79

\*Amount: £2,000

\*Frequency: Monthly

\*Frequency Type: Advanced

\*Taken Monthly: Yes

Indexation: None

Indexation Rate %: 0.00%

Reason: Add a reason...

## Update the results

Income Analysis Research..

Client: Susanna West | Description: Test Description | Created By: Amy Paulsen, 20/02/2025, 13:51

Results | Mark Status as Complete

Illustration Settings & Income

Scenarios: Test Scenario 2 (Selected) [Delete] [New] [Compare]

Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph [Update] [Revert]

Results: [Show gross income] [Show effect of inflation: 0.00%] [Export Chart]

Income Value

Income Requirements

Income Type: Level Income | Profited Income

Regular Income Amounts: + Add Regular Income

Type	Frequency	Frequency Type
Living Expenses - Age 67 - Age 79	Regular	Monthly
	Indexation	0.00%
	Amount	£2,000.00
		<input checked="" type="checkbox"/>

Living Expenses - Age 79 - Age 83

Type: Regular | Frequency: Monthly | Frequency Type: Advance

Indexation: [ ] | Amount: [ ]

Plans

Back

## Test Scenario 3

Repeat steps in Test Scenario 2 to create a third new scenario.

Scenarios

Test Scenario 3 (Selected) [Delete] [New] [Compare]

- Baseline
- Test Scenario 1
- Test Scenario 2
- Test Scenario 3 (Selected)

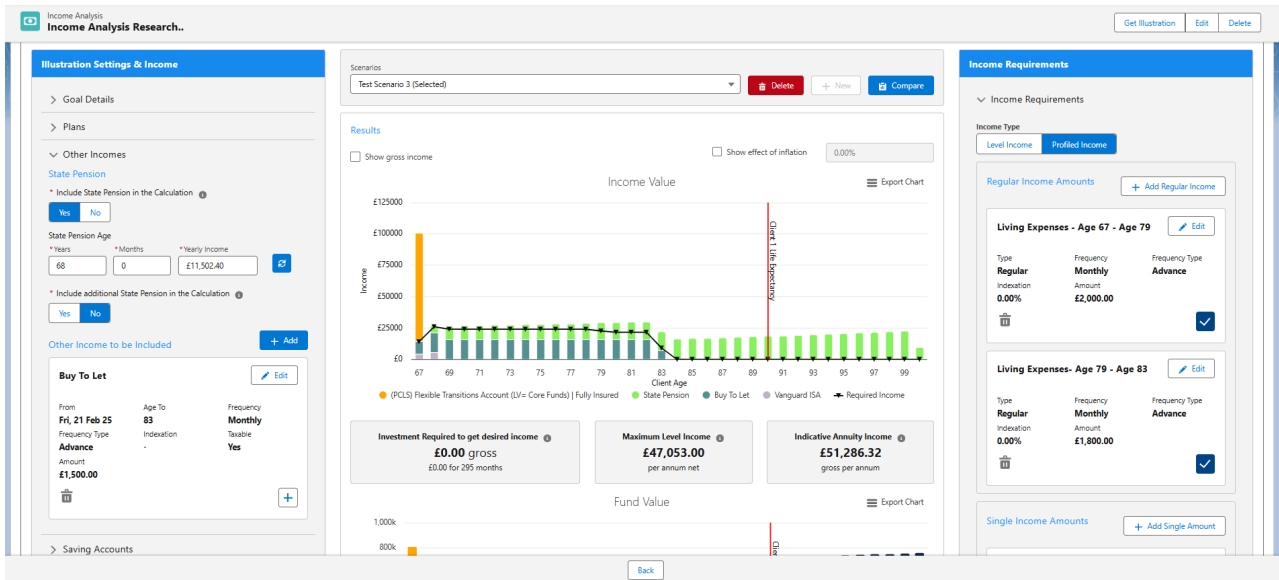
Show effect of inflation: 0.00%

Export Chart

For this scenario, we'll remove the client's Buy to Let, Other Income.

Click into **Other Incomes**





The additional scenarios are now created, see article [Income Analysis - Advanced Options - Income Hierarchy](#)