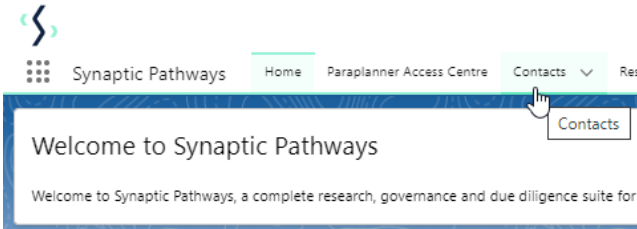
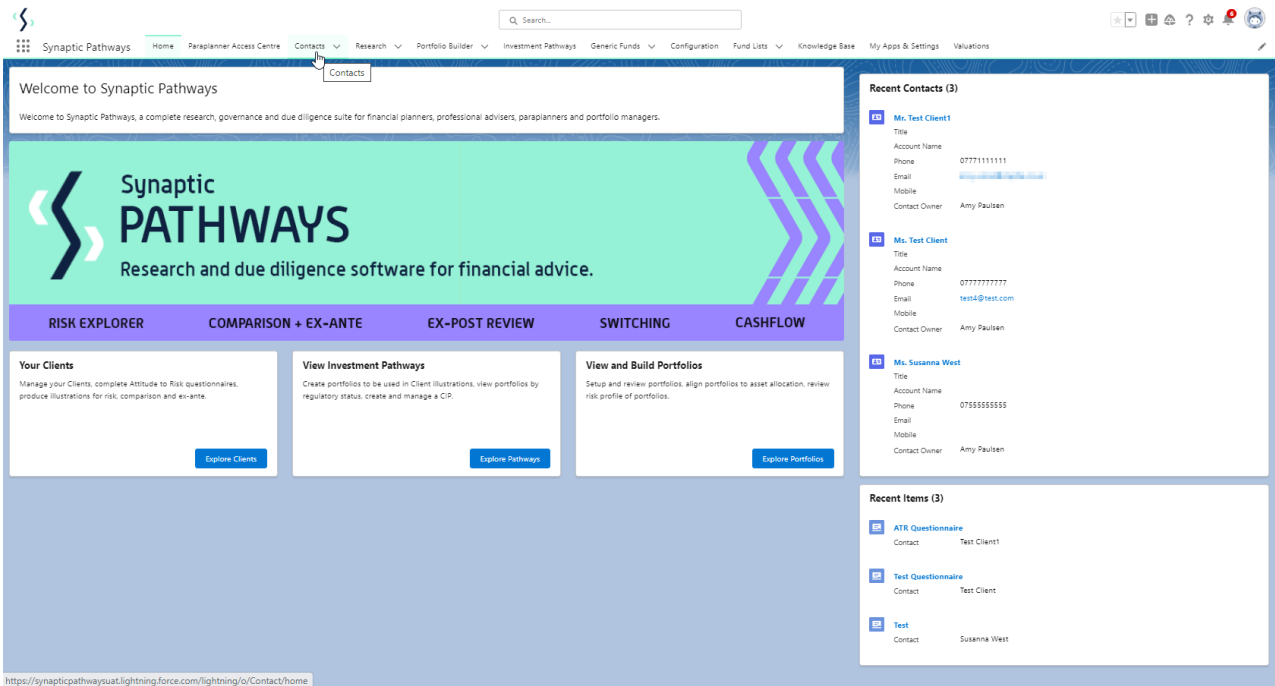


# Income Analysis - Joint Life - Create Research

Last Modified on 30/09/2024 4:34 pm BST

Create Joint Income Analysis research through the Contact record.

Navigate to **Contacts** tab:



Find your client in the list or search:



Contacts  
**Recently Viewed Contacts**

6 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

	Name ↑	Account Name
1	<a href="#">Ben Smith</a>	
2	<a href="#">Mike Smith</a>	
3	<a href="#">Steve Test</a>	
4	<a href="#">Test Client</a>	
5	<a href="#">test client account</a>	test client account
6	<a href="#">Test Client1</a>	

Scroll down to **Income Analysis** and click **New**:

Contact: Mr. Test Client1

Follow Edit New Contact New Opportunity

Related Details Medical Holdings Related Contacts Family ALUM

**We found no potential duplicates of this Contact.**

**Client Questionnaires (1)**

Client Questionnaire Name	Completed...	Risk Category	Risk Rating	Default ↑
<a href="#">ATR Questionnaire</a>	No	Moderately Cautious (High End)	4	

**Risk Illustrations (1)**

Illustration Name	Description...	Target Risk Category	Term	Review Date
<a href="#">Risk Illustration</a>		Moderately Cautious (High End)	10	

**Research (0)** [New](#)

**Income Analysis (0)** [New](#)

**Protection (0)** [New](#)

**Opportunities (0)** [New](#)

**Cases (0)** [New](#)

**Recent Items (3)**

- [ATR Questionnaire](#) Contact: Test Client1
- [Test Questionnaire](#) Contact: Test Client
- [Test](#) Contact: Susanna West

**Activity** Chatter

Filters: All time • All activities • All types

**Upcoming & Overdue**

No activities to show.  
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Complete **New Income Analysis** details:

### New Income Analysis

\* = Required Information

Information

\* Client Name  
Test Client1

\* Goal Name  
Income Analysis Research

Description  
Test Description

\* Review Date  
19/10/2024

Calendar: October 2024. Date 19 is selected.

Buttons: Save & New, Save, New

### Save

### New Income Analysis

\* = Required Information

Information

\* Client Name  
Test Client1

\* Goal Name  
Income Analysis Research

Description  
Test Description

\* Review Date  
19/10/2024

Buttons: Cancel, Save & New, Save

Click into the below link or into the newly created research:

Income Analysis "Income Analysis Research" was created.

The screenshot shows the 'Income Analysis (1)' interface. At the top, there is a header with 'Income Analysis (1)', '1 item • Updated a few seconds ago', and buttons for settings, refresh, and 'New'. Below the header is a table with columns: 'Goal Name', 'Client Name', 'Description', 'Type', 'Holdings', 'Fund Value', 'Income So...', and 'Review Date'. The table contains one row: 'Income Analysis Research', 'Test Client1', 'Test Description', and '19/10/2024'. A modal window titled 'Income Analysis Research' is open, showing 'Client Name: Test Client1', 'Description: Test Description', and 'Created By: Amy Paulsen, 05/10/2023, 10:54'. There is a 'View All' link at the bottom of the modal.

This will take you into the **Add Goal Details** screen:

The screenshot shows the 'Add Goal Details' screen for 'Income Analysis Research'. The top navigation bar includes 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Income Analysis Research'. The main content area has a breadcrumb trail: 'Goal Details > Charges > Plans > Income Requirements > Other Incomes > Annuity > Results'. The 'Add Goal Details' section includes:
 

- Drawdown Start:** 'Age' (83) and 'Date' (Date picker).
- \*Drawdown Start Age:** 'Enter Drawdown Start Age' (83).
- \*Annual Fund Growth Rate:** '0.00%'.
- Client Details - Susanna West:** '\*Forecast Life Expectancy' (83), 'Liable to Scottish Tax Rules?' (Yes/No), 'Tax Rate' (Current Tax Rate, At Retirement Tax Rate).
- Client Details - Second Client:** '+ Add Second Client' button.

 A 'What's Shown Here' box on the right explains that these details are used throughout the income analysis to provide a picture of how long the fund will last against a given income requirement. At the bottom, there are 'Cancel', 'Continue to Result Page', and 'Continue to Next Step' buttons.

For further information on Income Analysis research, see article [Income Analysis - Joint Life - Add Goal Details](#)