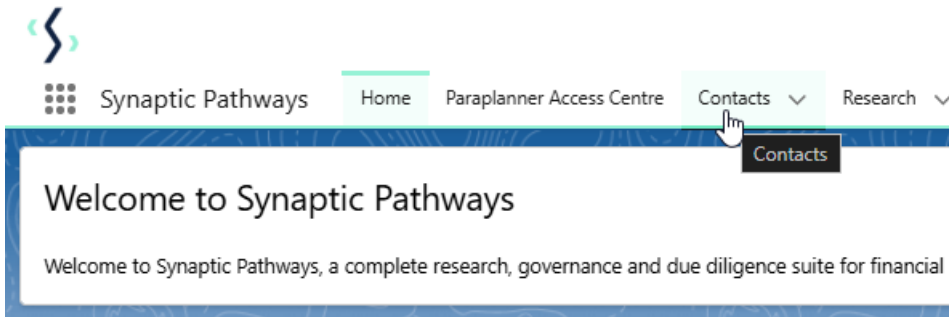
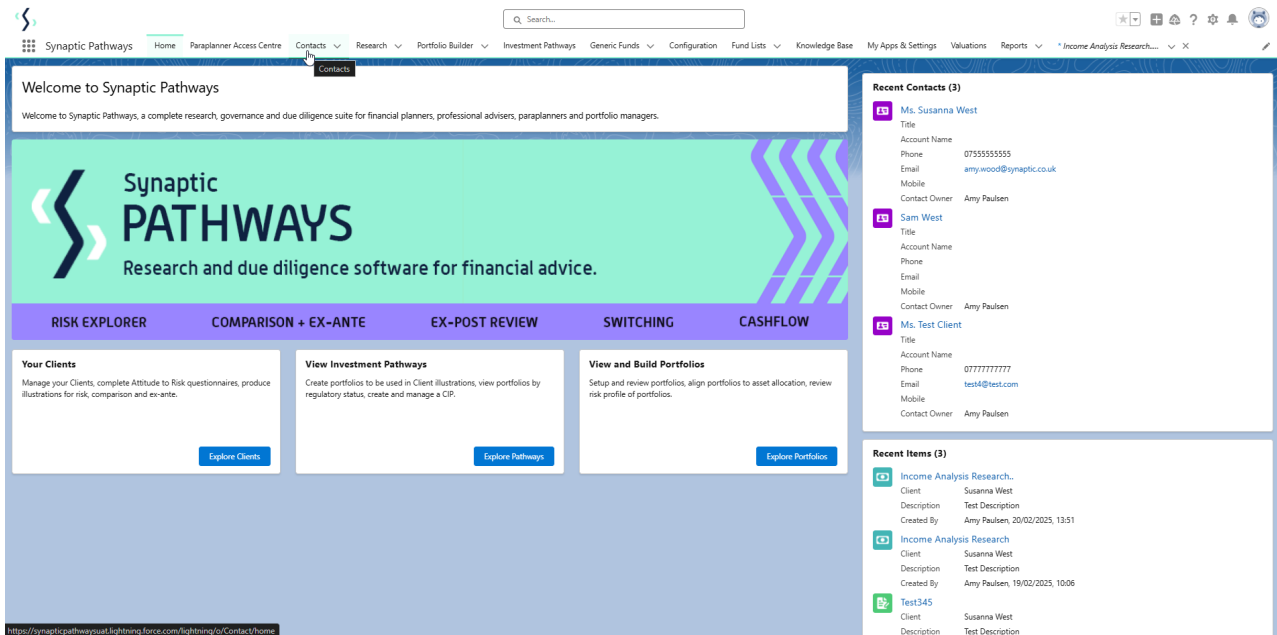


Income Analysis - Joint Life - Create Research

24/02/2025 3:14 pm GMT

Create Joint Income Analysis research through the Contact record.

Navigate to **Contacts** tab:



Find your client in the list or search:



Contacts

Recently Viewed

4 items • Updated a few seconds ago

	Name	Account Name
1	Susanna West	
2	Sam West	Susanna West
3	Test Client	
4	Les West	

Scroll down to Income Analysis and click New:

The screenshot shows the Synaptic Pathways interface with the 'Income Analysis' section selected. The 'New' button is highlighted with a red box. The interface includes a search bar, navigation tabs, and several data tables.

Illustration Name	Research Type	Description	Activity Due Date	Last Modified By	Convert To...
1 Test345	Comparison with Ex-ante	Test Description	01/02/2025	Amy Paulsen	
2 Test Switching	Switch	Test	25/10/2024	Amy Paulsen	
3 Test Switching	Ex-ante	Test		Amy Paulsen	
4 Test Switch	Switch	Test Description	03/12/2023	Amy Paulsen	
5 Test Switch	Ex-ante	Test Description		Amy Paulsen	

Goal Name	Income Re...	Goal Type	Holdings	Fund Value	Income So...	Review Date	Convert To
1 Income Analysis Research...						10/10/2024	Comparison With Ex-Ante
2 Phased Income Analysis						31/01/2025	Comparison With Ex-Ante
3 Test Income Analysis						25/01/2025	Comparison With Ex-Ante
4 Income Analysis Research						28/02/2025	Comparison With Ex-Ante
5 Income Analysis Research...						01/03/2025	Comparison With Ex-Ante

Protection Name	Description	Created Date
1 Protection Quote Test	Test Description Text	23/02/2024, 11:33
2 Protection Quote		06/03/2024, 10:22
3 Test		07/11/2024, 14:40
4 Test!		07/11/2024, 15:41
5 Test		11/12/2024, 11:56

Complete New Income Analysis details:

New Income Analysis

* = Required Information

Information

* Client

 Susanna West

* Goal Name

Income Analysis Research .

Description

Test Description

* Review Date

Format: 31/12/

February 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

Today

Save & New

Save



New

on Text

ate

, 11:33

, 10:22

, 14:40

, 15:41

Save

New Income Analysis

* = Required Information

Information

* Client

 Susanna West

* Goal Name

Income Analysis Research .

Description

Test Description

* Review Date

21/02/2025

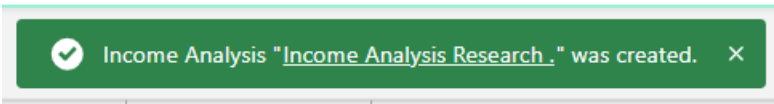
Cancel

Save & New

Save

Save

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



<input type="checkbox"/>	Goal Name	Income Re...	Goal Type	Holdings	Fund Value	Income So...	Review Date	Convert To
1	Income Analysis Research...						10/10/2024	Comparison With Ex-Ante
2	Phased Income Analysis						31/01/2025	Comparison With Ex-Ante
3	Test Income Analysis						25/01/2025	Comparison With Ex-Ante
4	Income Analysis Research						28/02/2025	Comparison With Ex-Ante
5	Income Analysis Research...						01/03/2025	Comparison With Ex-Ante

Income Analysis Research

Client: Susanna West
Description: Test Description
Created By: Amy Paulsen, 19/02/2025, 1...

[View All](#)

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

The screenshot shows the 'Goal Details' screen for 'Income Analysis Research'. The client is 'Susanna West', description is 'Test Description', and it was created by 'Amy Paulsen' on 24/02/2025 at 15:13. The screen is divided into several sections: 'Add Goal Details' with 'Cashflow Start' (Age: 42, Date: 17/09/1982), 'Client Details - Susanna West' (Age: 42, Date of Birth: 17/09/1982), 'Drawdown Start' (Age: 42, Date: 17/09/1982), 'Retirement Start' (Age: 42, Date: 17/09/1982), 'Forecast Life Expectancy' (84), 'Liable to Scottish Tax Rules?' (Yes), and 'Tax Rate' (Current Tax Rate). A 'What's Shown Here' box explains that these details are used for the income analysis. Navigation buttons include 'Cancel', 'Continue to Result Page', and 'Continue to Next Step'.

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