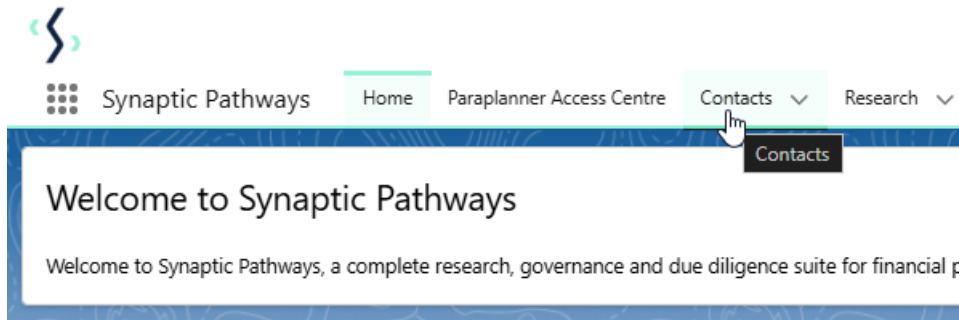
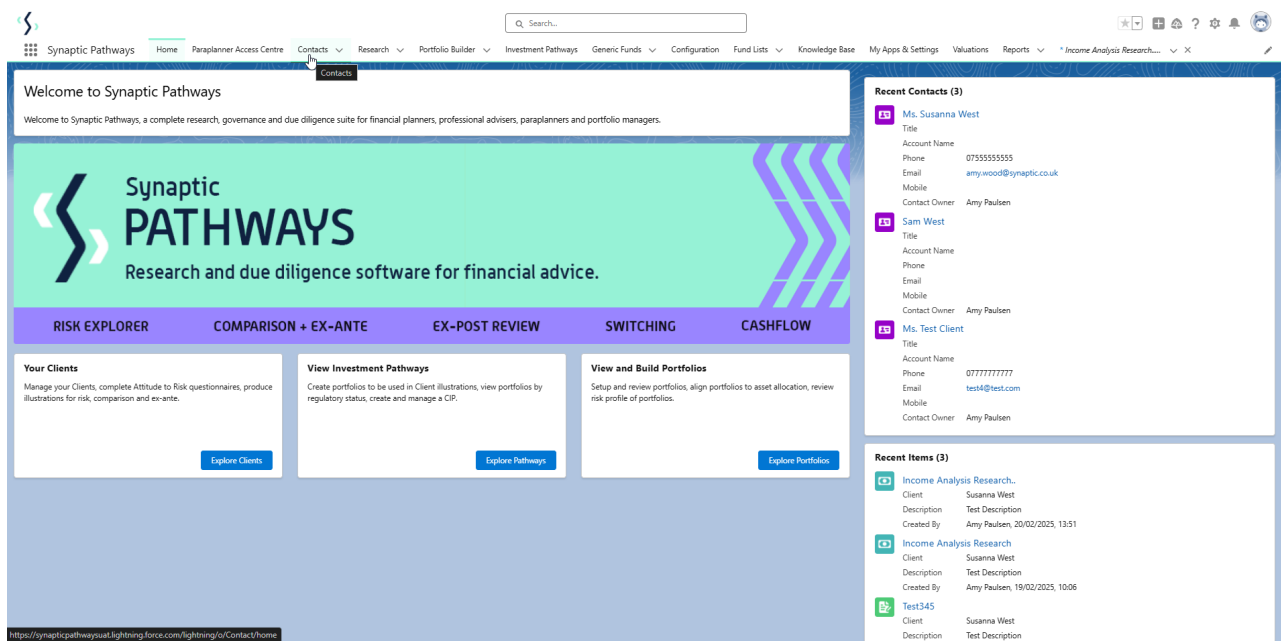


# Income Analysis - Joint Life - Create Research

22/04/2025 12:14 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	
4 items • Updated a few seconds ago	
<input type="checkbox"/> Name	Account Name
1 <input type="checkbox"/> <a href="#">Susanna West</a>	
2 <input type="checkbox"/> <a href="#">Sam West</a>	Susanna West
3 <input type="checkbox"/> <a href="#">Test Client</a>	
4 <input type="checkbox"/> <a href="#">Les West</a>	

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

Synaptic PathwaysHomeParaplanner Access CentreContactsResearchPortfolio BuilderInvestment PathwaysGeneric FundsConfigurationFund ListsKnowledge BaseMy Apps & SettingsValuationsReportsIncome Analysis Research...

Search...

StarAddShareHelpSettingsUser

Ms. Susanna West

+ FollowEditNew ContactNew Opportunity

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

View All

Income Analysis (5)

5 items • Updated a few seconds ago

New

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

View All

Protection (5)

5 items • Updated a few seconds ago

New

<input type="checkbox"/>	Protection Name	Description	Created Date
1	<a href="#">Protection Quote Test</a>	Test Description Test	22/02/2024, 11:33
2	<a href="#">Protection Quote</a>		06/03/2024, 10:22
3	<a href="#">Test</a>		07/11/2024, 14:40
4	<a href="#">Test1</a>		07/11/2024, 15:41
5	<a href="#">Test</a>		11/12/2024, 11:56

View All

Complete **New Income Analysis** details, including whether you would like to use the accumulation or decumulation questionnaire risk rating in the research.





Income Analysis "Joint Income Analysis Research" was created. ✕

Income Analysis (4)								⚙	🔍	New
4 Items • Updated a few seconds ago										
<input type="checkbox"/>	Goal Name	Income Re...	Goal Type	Holdings	Fund Value	Income So...	Review Date	Convert To		
1	<input type="checkbox"/> Income Analysis Research						28/02/2025	Comparison With Ex-Ante		
2	<input type="checkbox"/> Phased Drawdown.						10/04/2025			
3	<input type="checkbox"/> Test Income						19/04/2025	Comparison With Ex-Ante		
4	<input type="checkbox"/> Joint Income Analysis Research						22/04/2025			

Joint Income Analysis Research

Client  
Susanna West

Description  
Test Description

Created By  
Amy Paulsen, 22/04/2025, 1...

View All

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

Synaptic Pathways

Home

Paraplanner Access Centre

Contacts

Research

Portfolio Builder

Investment Pathways

Generic Funds

Configuration

Fund Lists

Knowledge Base

My Apps & Settings

Valuations

Reports

Joint Income Analysis Res...

More

Income Analysis

Joint Income Analysis Research

Get Illustration

Edit

Delete

Client  
Susanna West

Description  
Test Description

Created By  
Amy Paulsen, 22/04/2025, 12:11

Goal Details

Plans

Income Requirements

Other Incomes

Annuity

Results

Mark Status as Complete

Add Goal Details

Cashflow Start

Age

Date

\*Cashflow Start Age

Enter Cashflow Start Age

Date: 17/08/1982

Client Details - Susanna West

Age

42

Date of Birth

17/09/1982

Drawdown Start

Age

Date

\*Drawdown Start Age

Enter Drawdown Start Age

Date: 17/08/1982

Retirement Start

Age

Date

\*Retirement Start Age

Enter Retirement Start Age

Date: 17/08/1982

\*Forecast Life Expectancy

64

Liable to Scottish Tax Rules?

Yes

No

Tax Rate

Current Tax Rate

Client Details - Second Client

+ Add Second Client

What's Shown Here

These details will be used throughout the income analysis to provide a picture of how long the fund will last against a given income requirement.

Cancel

Continue to Result Page

Continue to Next Step

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