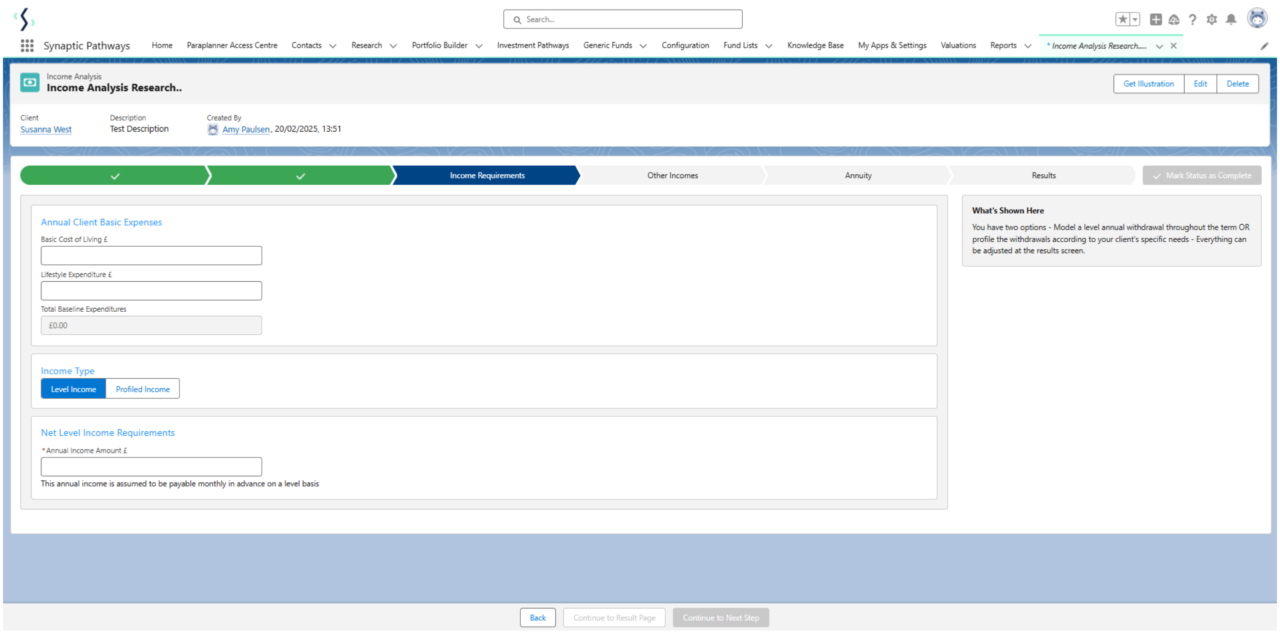
Income Analysis - Joint Life - Income Requirements

25/02/2025 11:26 am GMT

This article is a continuation of Income Analysis - Joint Life - Add Plans

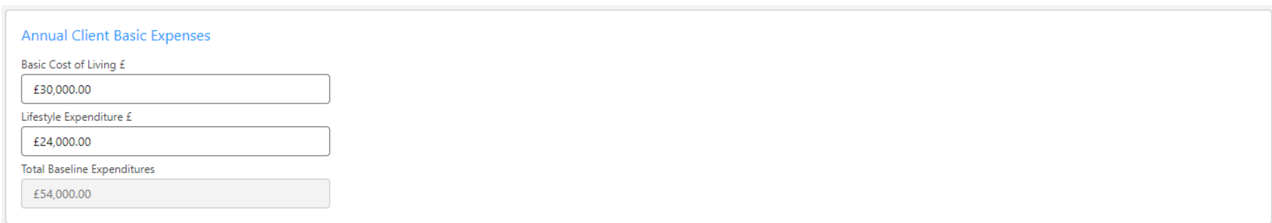
The **Income Requirements** area includes **Annual Client Basic Expenses** and **Level** or **Profiled Income**. If a joint client, this will be the clients combined income requirements.



Annual Client Basic Expenses

Enter your client's annual basic expenses.

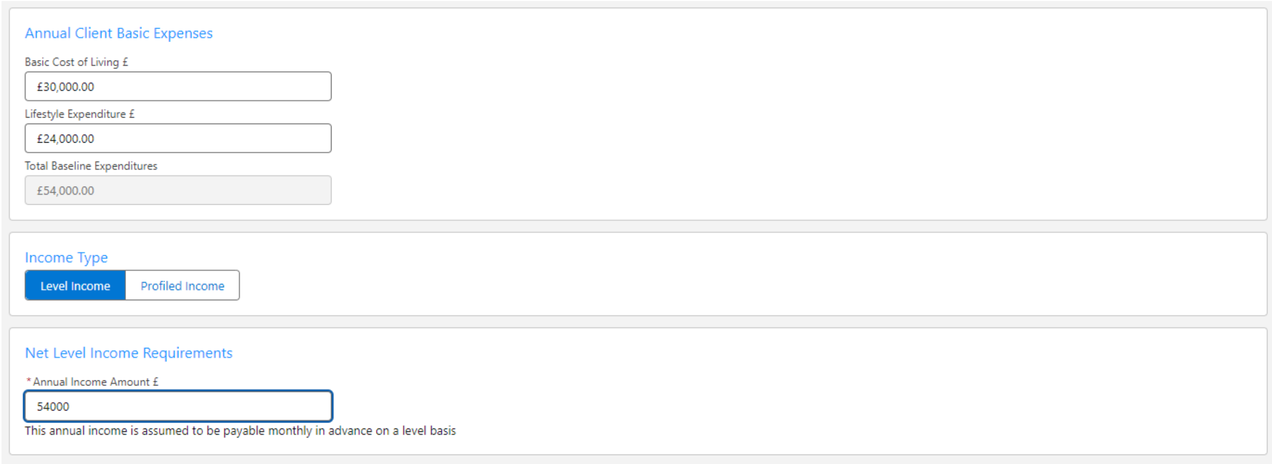
Complete the basic cost of living and lifestyle expenditure fields. This will calculate a Total Baseline Expenditure automatically:



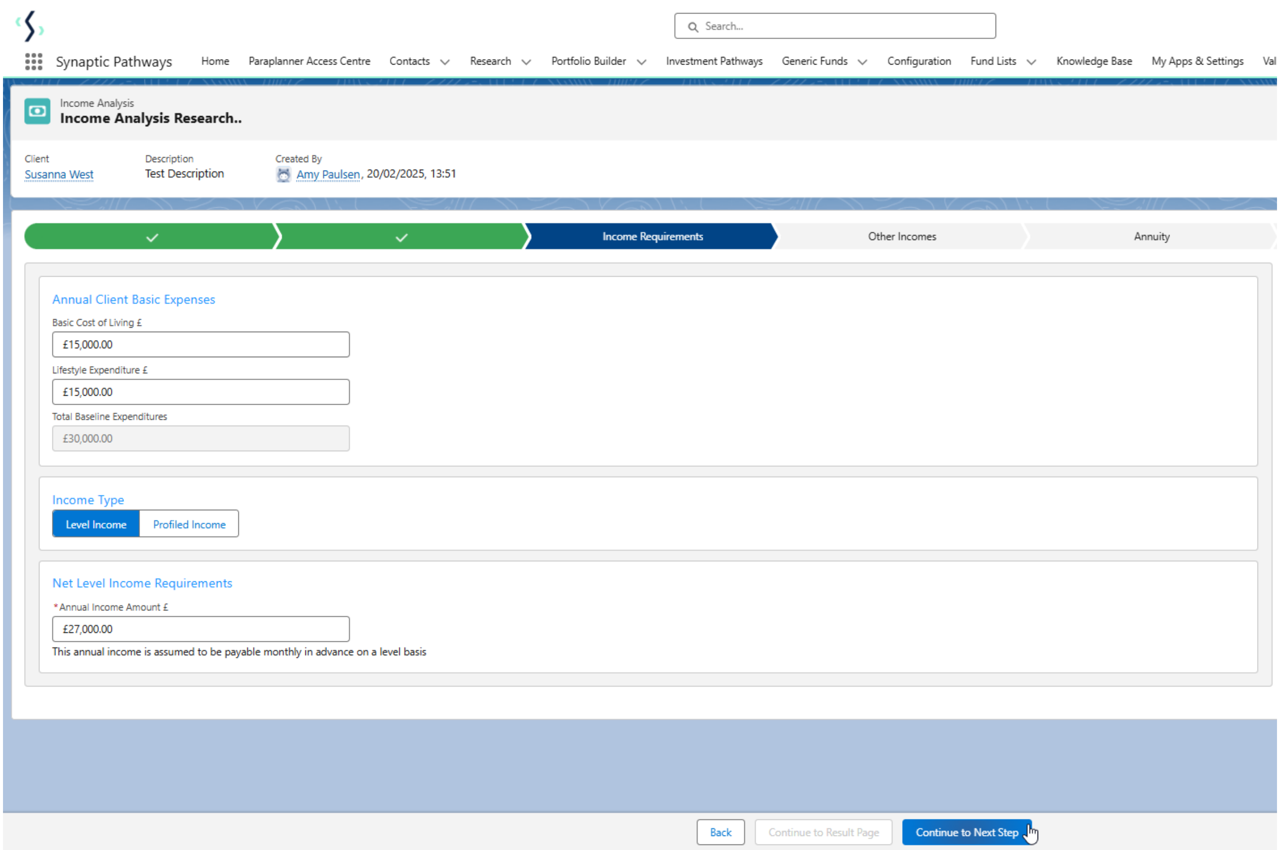
These values are not used in the calculations, but allow you to capture this information for the final report.

Level Income

Level Income is selected by default once you land on the **Income Requirements** page.

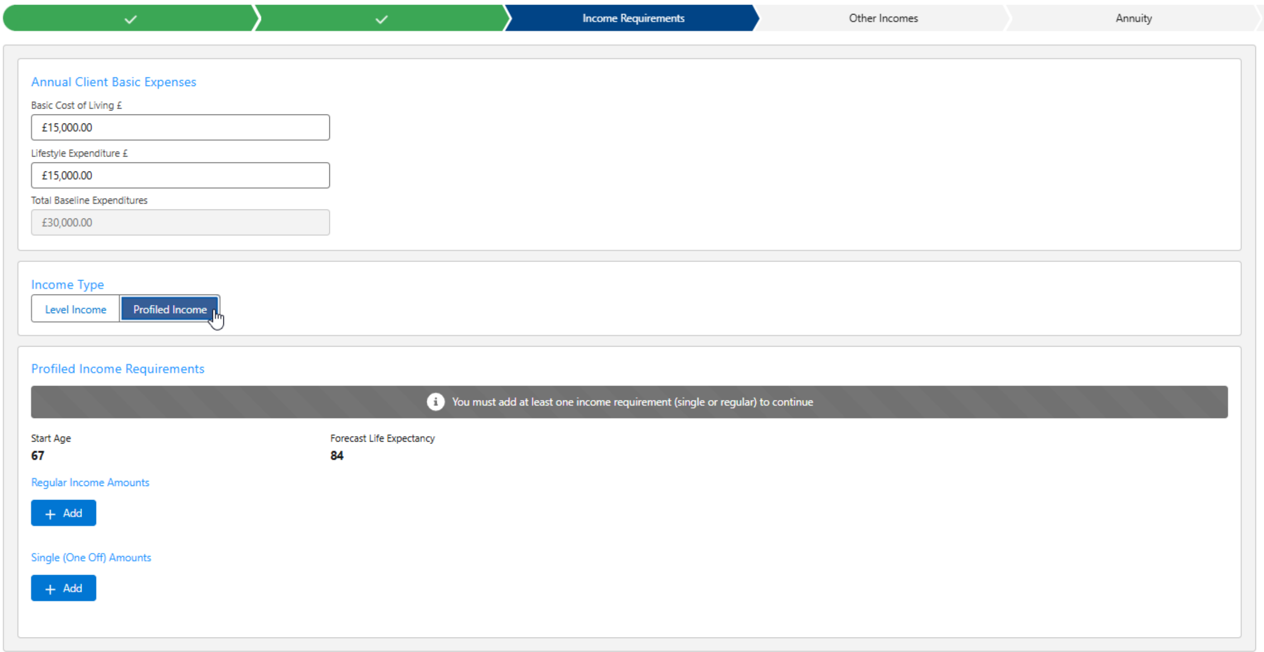


Enter an **Annual Income Amount** and **Continue to Next Step**



Profiled Income

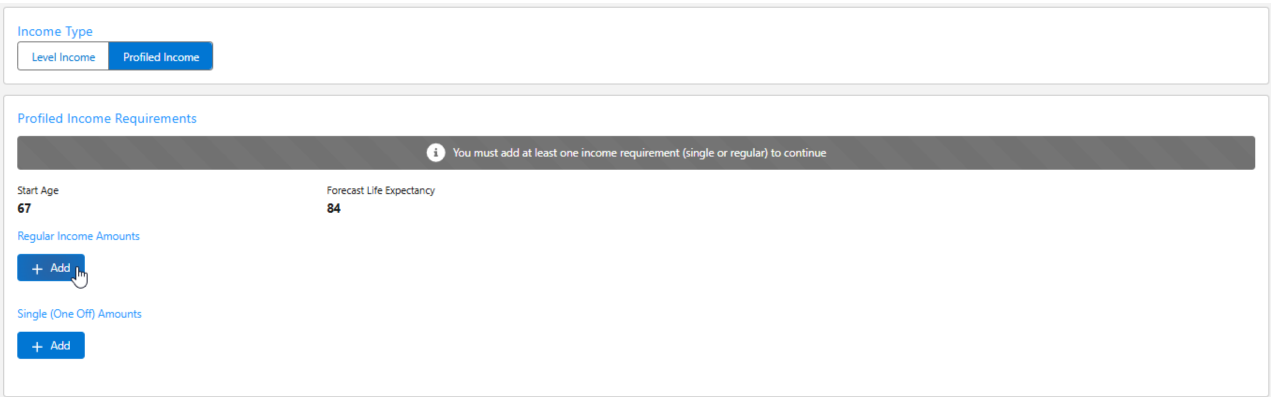
Select **Profiled Income:**



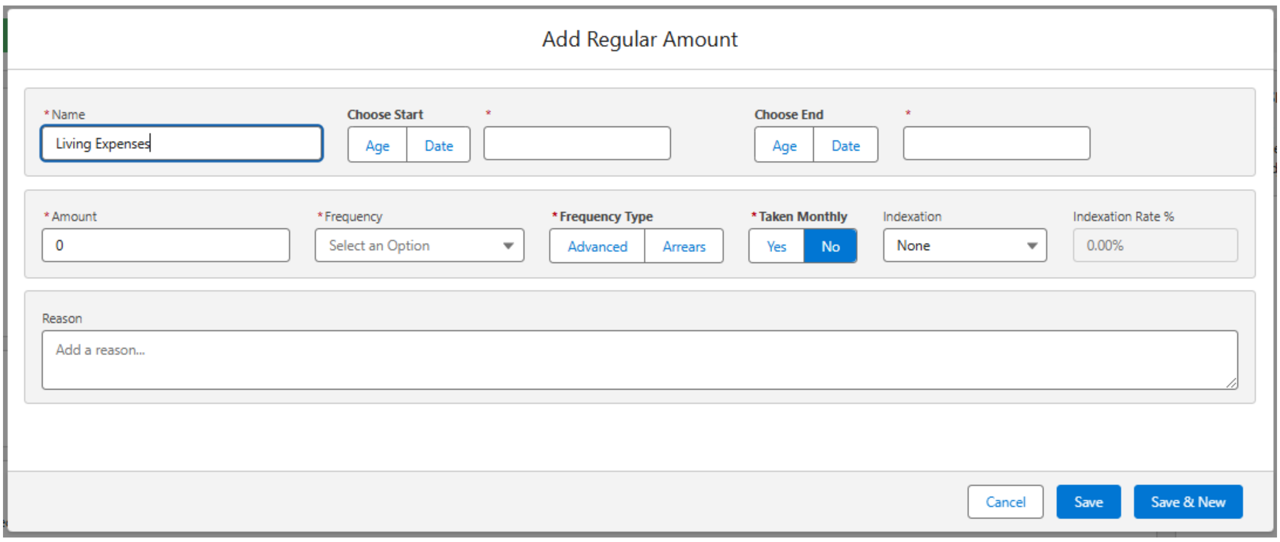
Regular and Single amounts can be added.

<u>Regular</u>

Click **+ Add:**



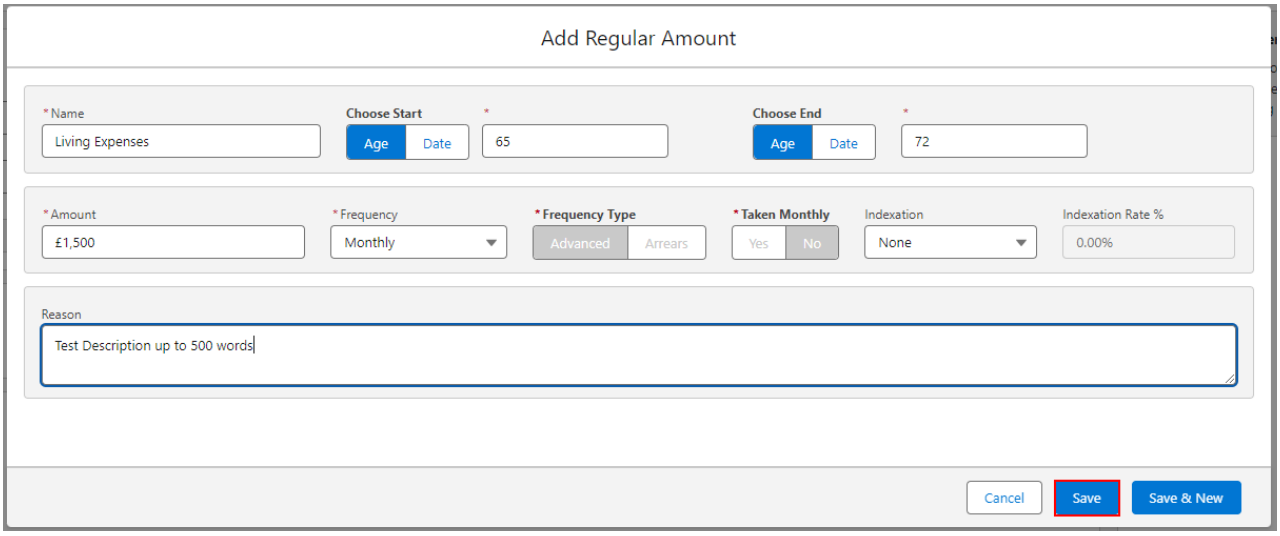
Add **Name** of the **Regular Income Amounts**:

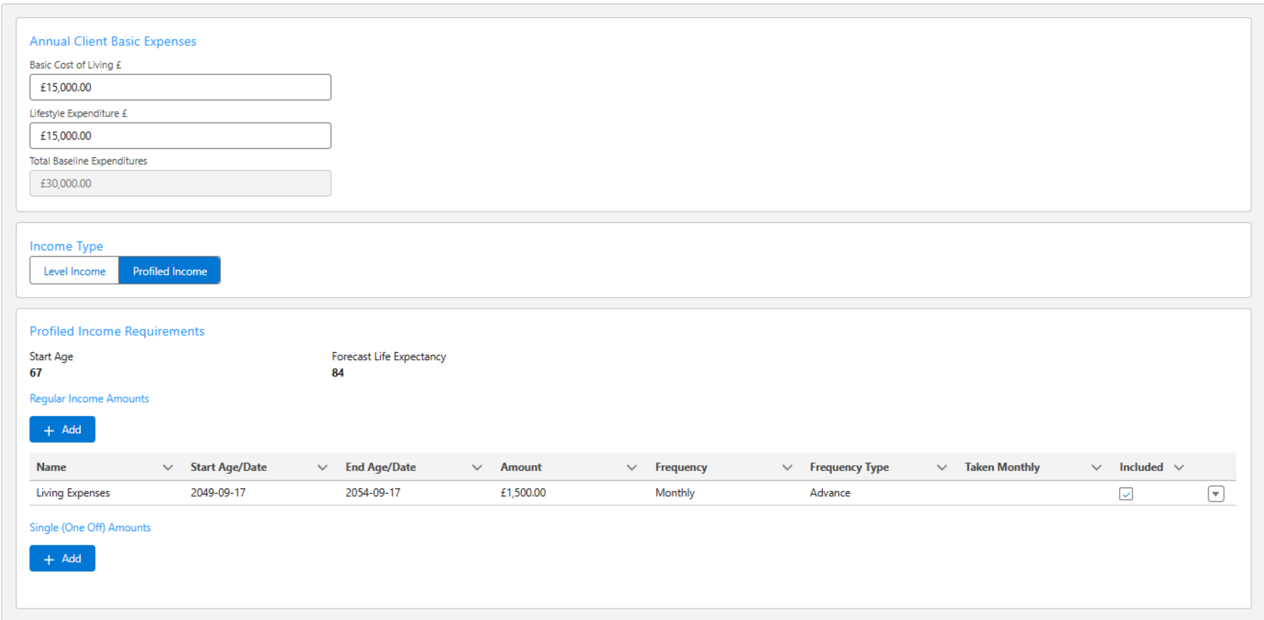


Choose **Age** or **Date**:

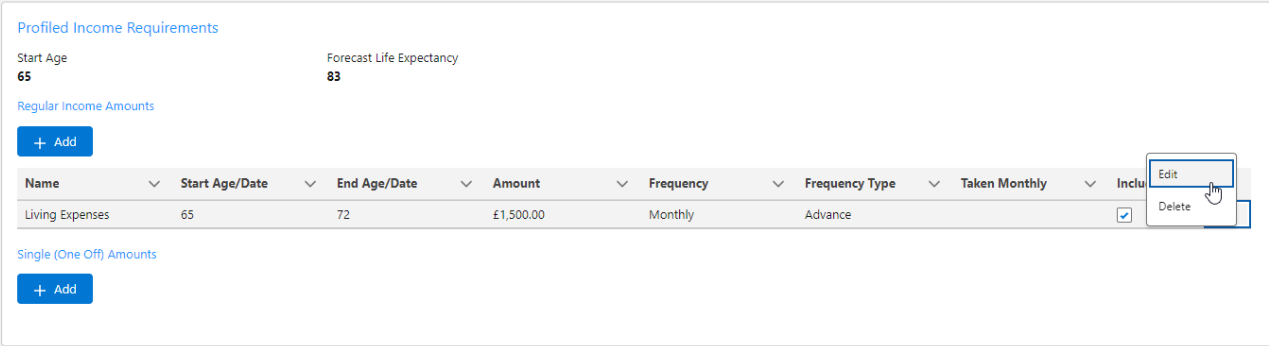
Complete remaining details.

Add a **Reason** up to 500 words.





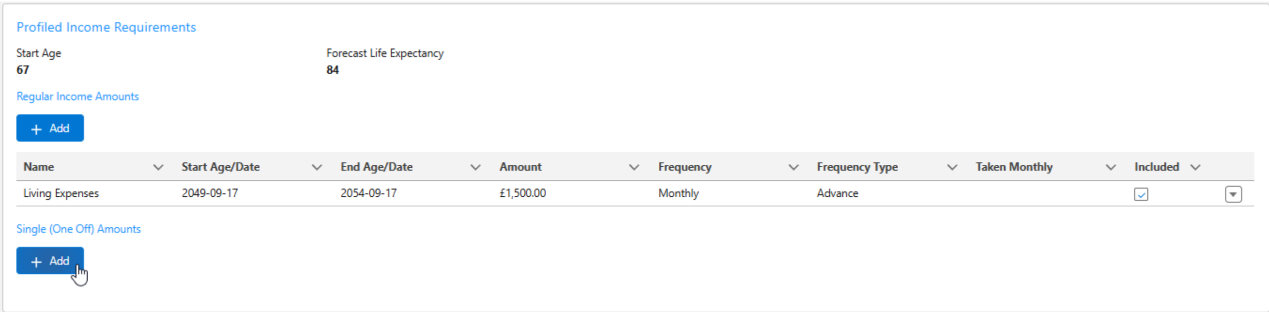
To edit any details, click into the drop down arrow to the right of the record and click **Edit:**



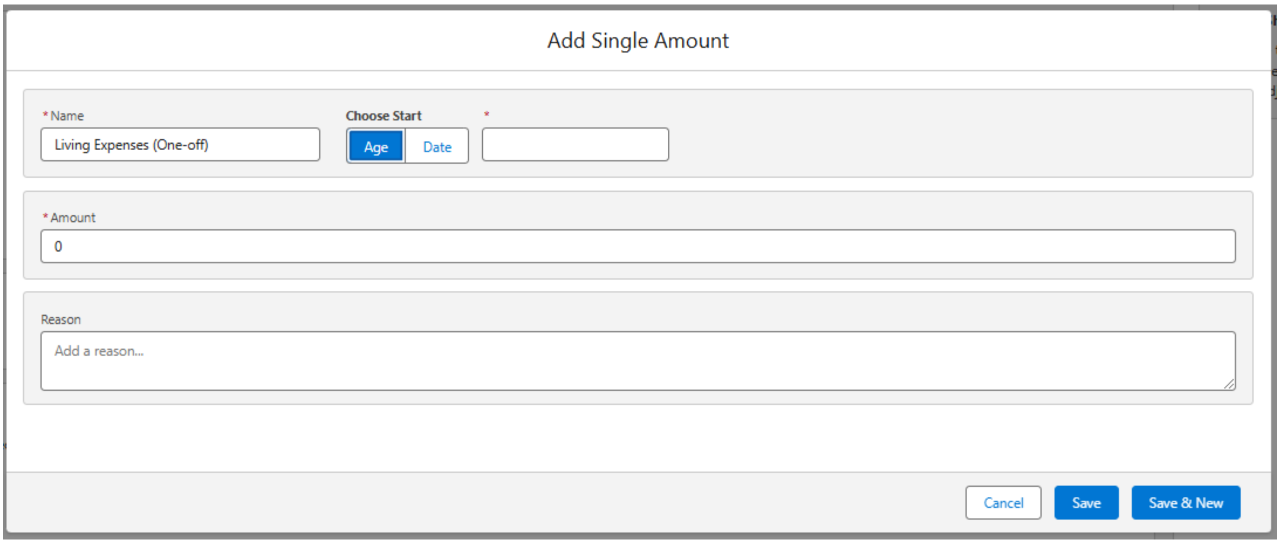
Save once done.

<u>SIngle (One Off)</u>

Click **+Add:**



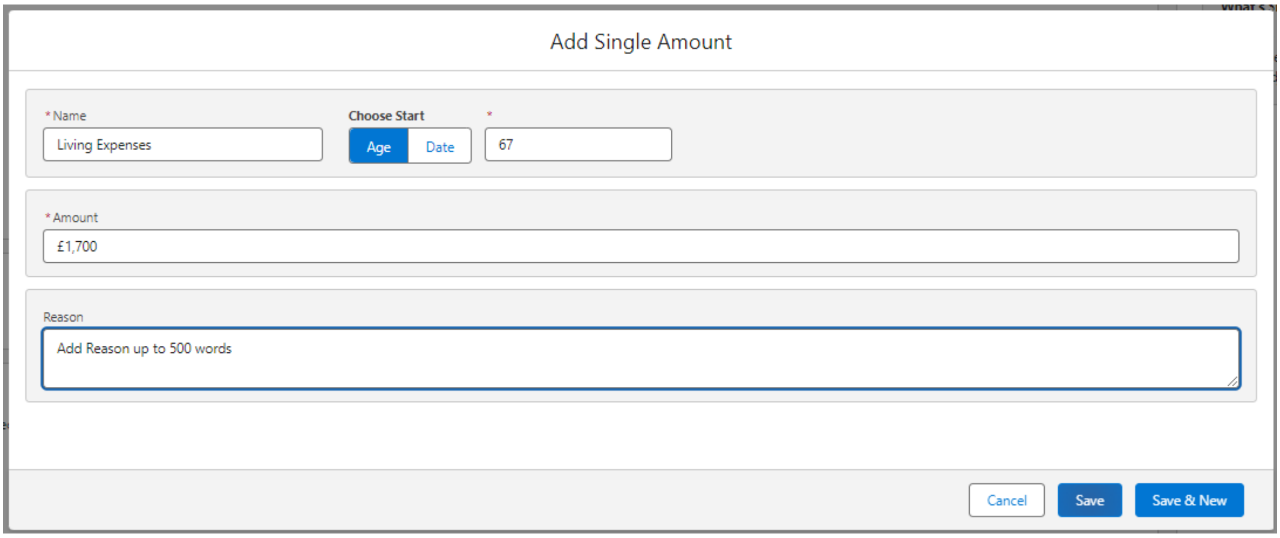
Add **Name** of the **Single (One Off) Amounts:**

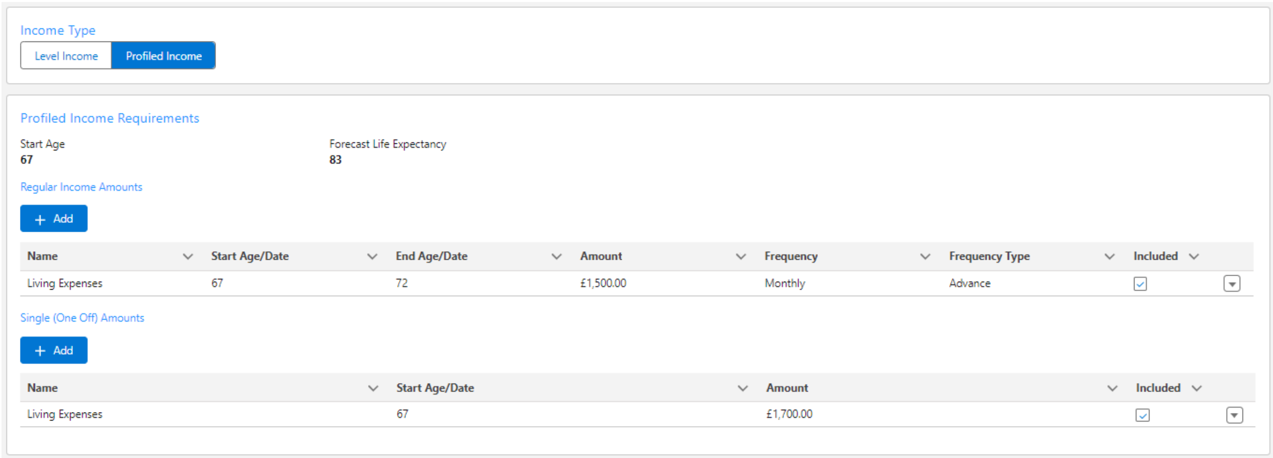


Choose **Age** or **Date:**

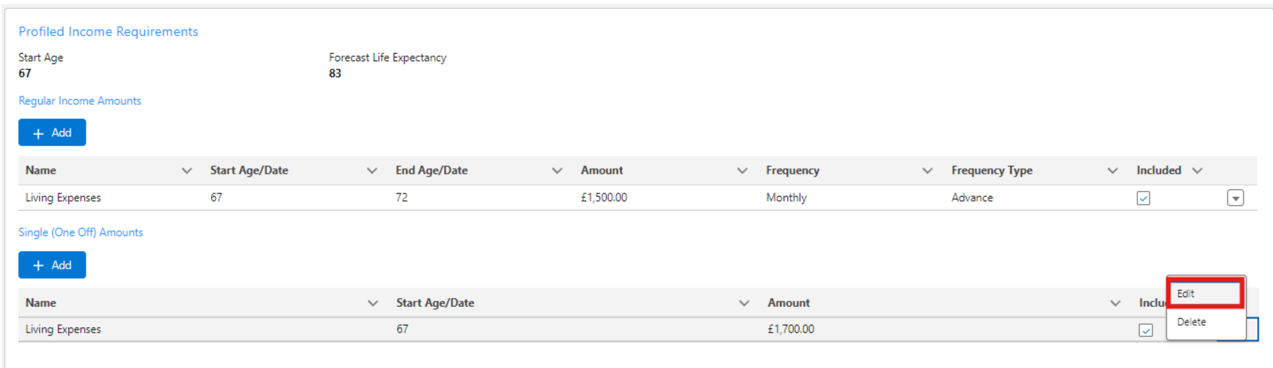
Complete remaining details.

Add a **Reason** up to 500 words.





To edit any details, click into the drop down arrow to the right of the record and click **Edit:**



Save once done.

For further information on Income Analysis research, see article Income Analysis - Joint Life - Other Incomes