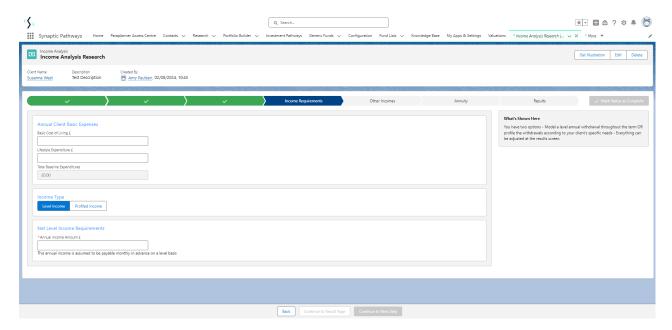
Income Analysis - Joint Life - Income Requirements

Last Modified on 17/12/2024 2:26 pm GMT

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

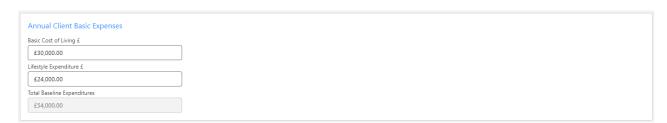
The Income Requirements area includes Annual Client Basic Expenses and Level or **Profiled Income**. If a joint client, this will be the clients combined income requirements.



Annual Client Basic Expenses

Enter your client's annual basic expenses.

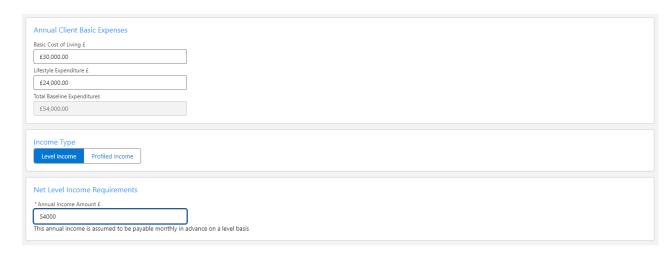
Complete the basic cost of living and lifestyle expenditure fields. This will calculate a Total Baseline Expenditure automatically:



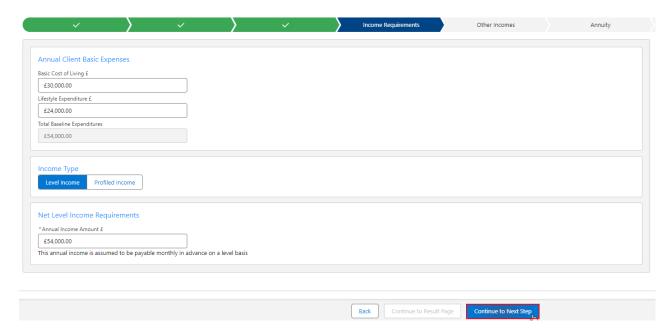
These values are not used in the calculations, but allow you to capture this information for the final report.

Level Income

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

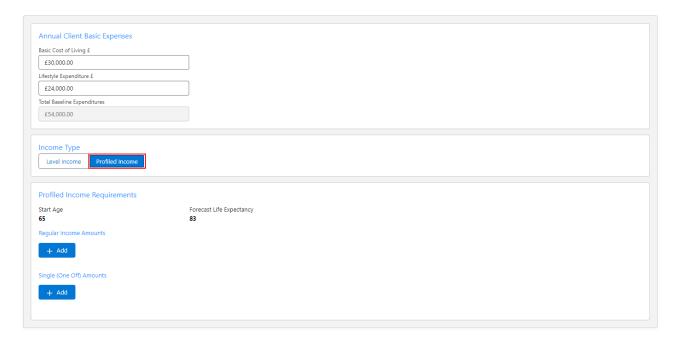


Enter an Annual Income Amount and Continue to Next Step



Profiled Income

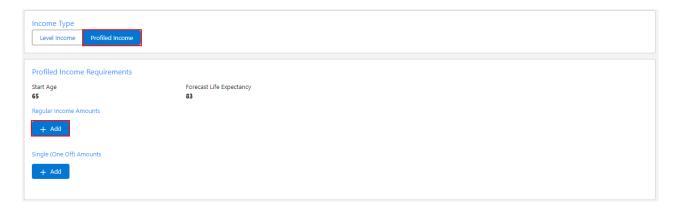
Select Profiled Income:



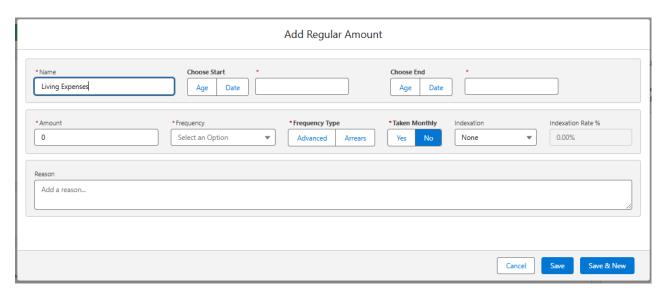
Regular and Single amounts can be added.

Regular

Click + Add:



Add Name of the Regular Income Amounts:

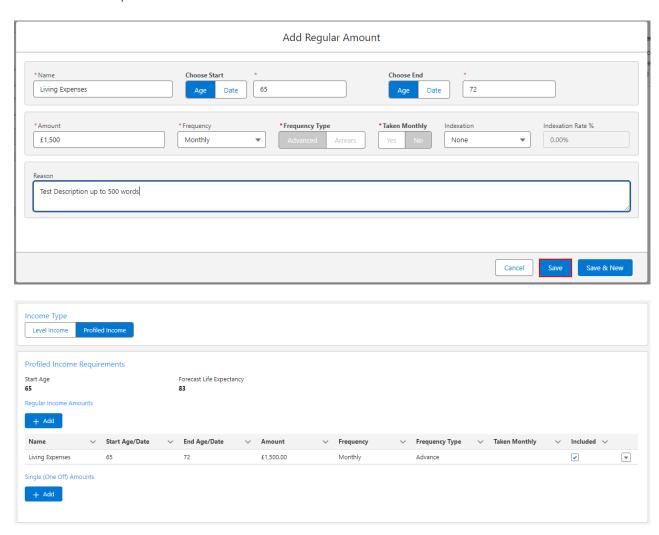


Choose Age or Date:

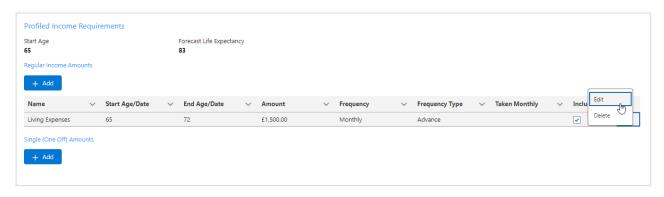


Complete remaining details.

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



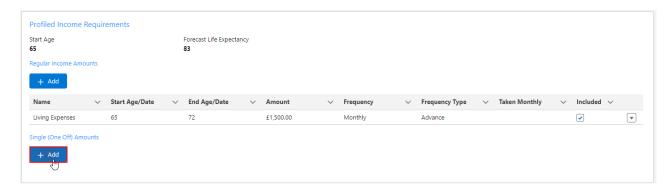
To edit any details, click into the drop down arrow to the right of the record and click Edit:



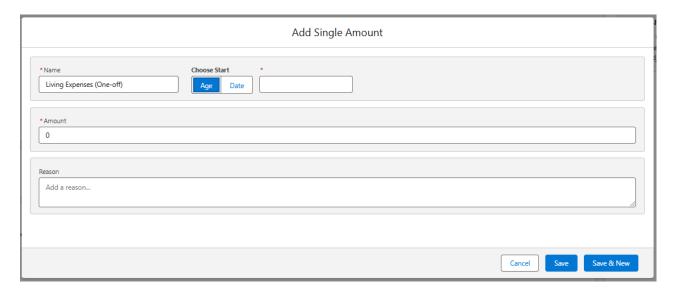
Save once done.

Single (One Off)

Click +Add:



Add Name of the Single (One Off) Amounts:

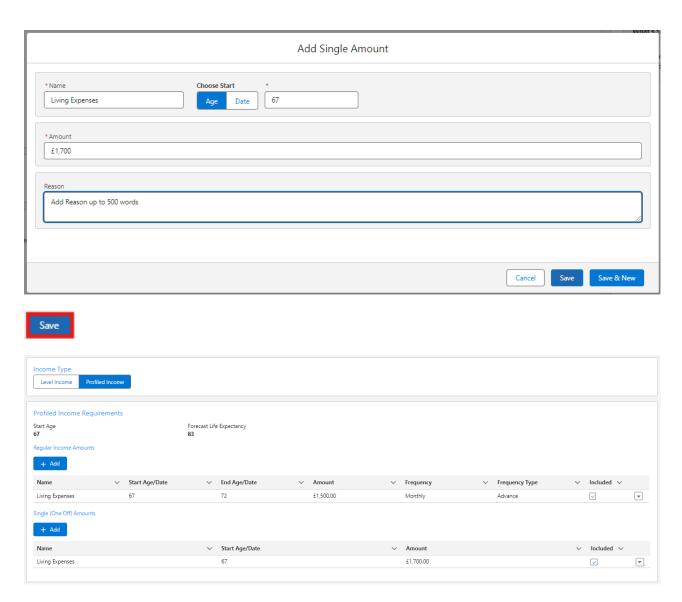


Choose Age or Date:

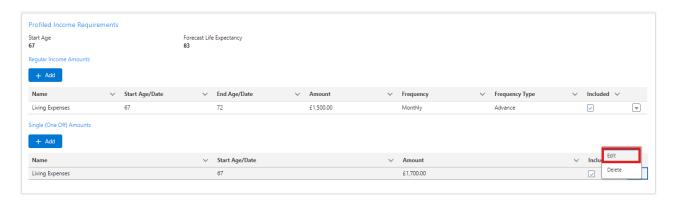


Complete remaining details.

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