

Income Analysis - Joint Life - Advanced Options

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Advanced Options function the same for both single and joint clients.

When doing joint research, you will be able to tweak details of both clients, including all details of the income analysis scenario.

The screenshot displays the 'Income Analysis Research' interface. The 'Illustration Settings & Income' section is active, showing 'Client Details - Susanna West' with a 'Forecast Life Expectancy' of 83 and 'Liable to Scottish Tax Rules?' set to 'No'. The 'Income Value' chart shows income components over time, and the 'Income Requirements' section shows 'Annual Income Amount' set to £54,000.00. The 'Investment Required to get desired income' is £0.00 gross, the 'Maximum Level Income' is £65,034.00 per annum net, and the 'Indicative Annuity Income' is £27,710.28 gross per annum.

The screenshot displays the 'Annuity' section of the 'Income Analysis Research' interface. The 'Indicative Annuity Income - Susanna West' section is highlighted with a red box, showing an 'Indicative Annuity Income Quote' of £25,969.56 per annum gross. The 'Fund Value' chart shows fund value components over time. The 'Investment Required to get desired income' is £0.00 gross, the 'Maximum Level Income' is £65,034.00 per annum net, and the 'Indicative Annuity Income' is £27,710.28 gross per annum.

For more information about Advanced options, see the following articles:

[Income Analysis - Advanced Options](#)

[Income Analysis - Advanced Options - Creating Scenarios](#)

[Income Analysis - Advanced Options - Editing Scenarios](#)

[Income Analysis - Advanced Options - Income Hierarchy](#)

[Income Analysis - Advanced Options - Scenario Editor](#)

[Income Analysis - Advanced Options - Compare](#)

[Income Analysis - Advanced Options - Choosing your selected scenario](#)
