

Income Analysis - Advanced Options - Scenario Editor

25/02/2025 3:12 pm GMT

This article is a continuation of [Income Analysis - Advanced Options - Choosing your selected scenario.](#)

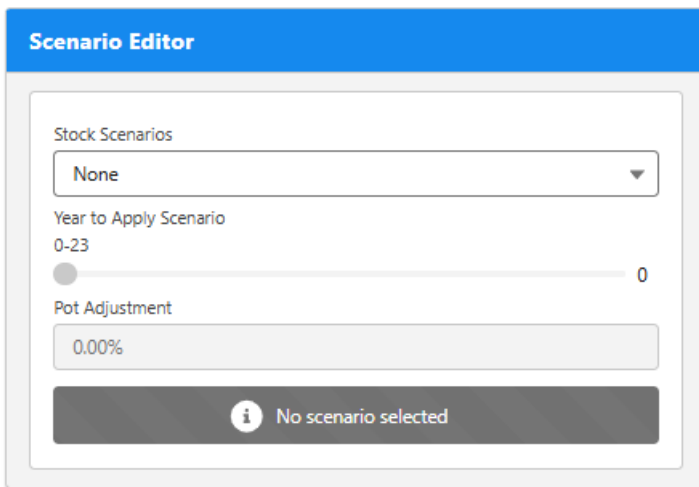
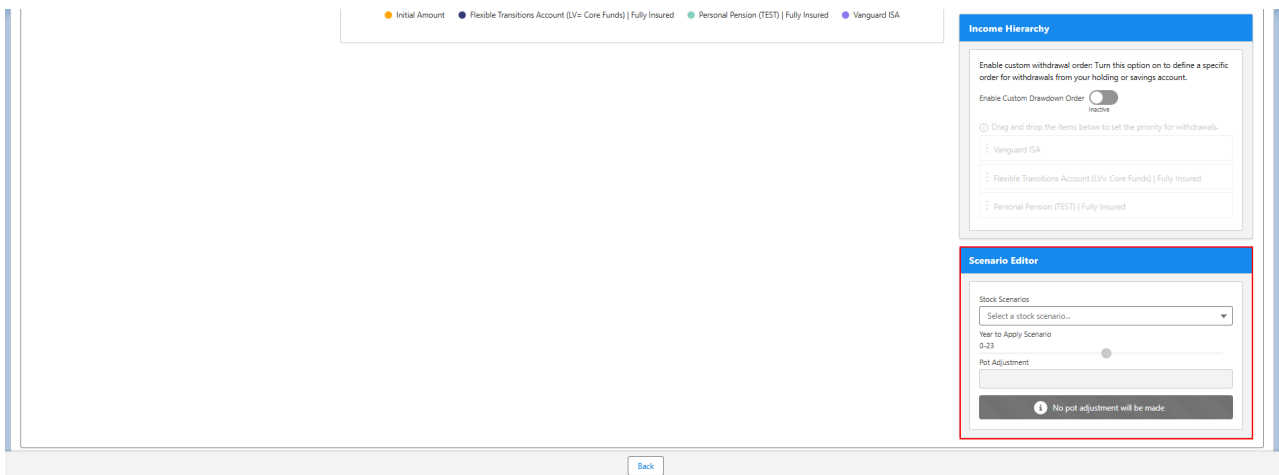
Scenario Editor can be found on the bottom right of the Advanced Options screen.

This allows you to select market event scenarios, which can be applied to the analysis. For e.g. you can select from a list of default events:

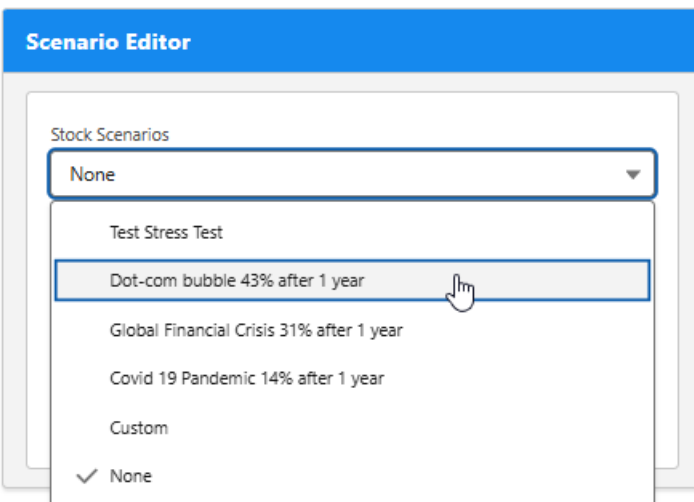
- Dot-com bubble 43% after 1 year
- Global Financial Crisis 31% after 1 year
- Covid 19 Pandemic 14% after 1 year

The screenshot displays the 'Income Analysis Scenario Editor' interface. The top navigation bar includes 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', 'Valuations', 'Reports', and the current scenario name 'Income Analysis Research...'. The main interface is divided into several sections:

- Illustration Settings & Income:** Contains 'Goal Details' with 'Cashflow Start' (Age: 67, Date: 17/09/2049) and 'Drawdown Start' (Age: 67, Date: 17/09/2049). It also includes 'Client Details - Susanna West' (Age: 42, Date of Birth: 17/09/1982) and 'Forecast Life Expectancy' (Age: 90). A 'Liable to Scottish Tax Rules?' section is set to 'No'.
- Scenarios:** Shows 'Test Scenario 1 (Selected)' with options to 'Delete', '+ New', and 'Compare'.
- Results:** Features two charts: 'Income Value' (Y-axis: £0 to £120,000) and 'Fund Value' (Y-axis: 0 to 1,000k). Both charts show a vertical red line for 'Client Life Expectancy' at age 90. The Income chart includes a legend for '(PCLS) Flexible Transitions Account (I/Va Core Funds) Fully Insured', 'State Pension', 'Buy To Let', 'Vanguard ISA', and 'Required Income'. Summary boxes below the charts show: 'Investment Required to get desired income: £0.00 gross (£0.00 for 295 months)', 'Maximum Level Income: £47,053.00 per annum net', and 'Indicative Annuity Income: £51,286.32 gross per annum'.
- Income Requirements:** Lists 'Regular Income Amounts' and 'Single Income Amounts'. Under 'Regular Income Amounts', there are two entries: 'Living Expenses - Age 67 - Age 79' (Type: Regular, Frequency: Monthly, Amount: £1,500.00) and 'Living Expenses - Age 79 - Age 83' (Type: Regular, Frequency: Monthly, Amount: £1,800.00). Under 'Single Income Amounts', there is one entry: 'One Off Cost - Age 68' (Type: Single, Amount: £2,000.00). Each entry has an 'Add' button and a checkmark.



Click into the Stock Scenario dropdown to select an option. Custom stock scenarios can be created either as a one off in the scenario, or you can add company wide stress test within Configuration > Stress Test. View article - [Company Settings - Stress Test](#) for more information.



Scenario Editor

Stock Scenarios

Dot-com bubble 43% after 1 year

Year to Apply Scenario

0-23

Pot Adjustment

-43.00%

Decrease all pots by 43.00% in year 1

Scroll to the top of the screen and **Update**

Income Analysis Research..

Client: Susanna West | Description: Test Description | Created By: Amy Paulsen, 20/02/2025, 13:51

Results | Mark Status as Complete

Illustration Settings & Income

Goal Details

Cashflow Start

Age: 67 | Date: 17/08/2049

Client Details - Susanna West

Age: 42 | Date of Birth: 17/09/1982

Drawdown Start

Age: 67 | Date: 17/08/2049

Forecast Life Expectancy: 90

Liable to Scottish Tax Rules? Yes/No

Scenarios: Test Scenario 1 (Selected) | Delete | + New | Compare

Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph | Update | Revert

Results

Income Value

Income: £0 to £120,000 | Client Age: 67 to 99

Income Requirements

Income Type: Level Income | Profited Income

Regular Income Amounts

Living Expenses - Age 67 - Age 79

Type	Frequency	Frequency Type
Regular	Monthly	Advance
Inflation	Amount	
0.00%	£1,500.00	

Living Expenses - Age 79 - Age 83

Type	Frequency	Frequency Type
Regular	Monthly	Advance

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