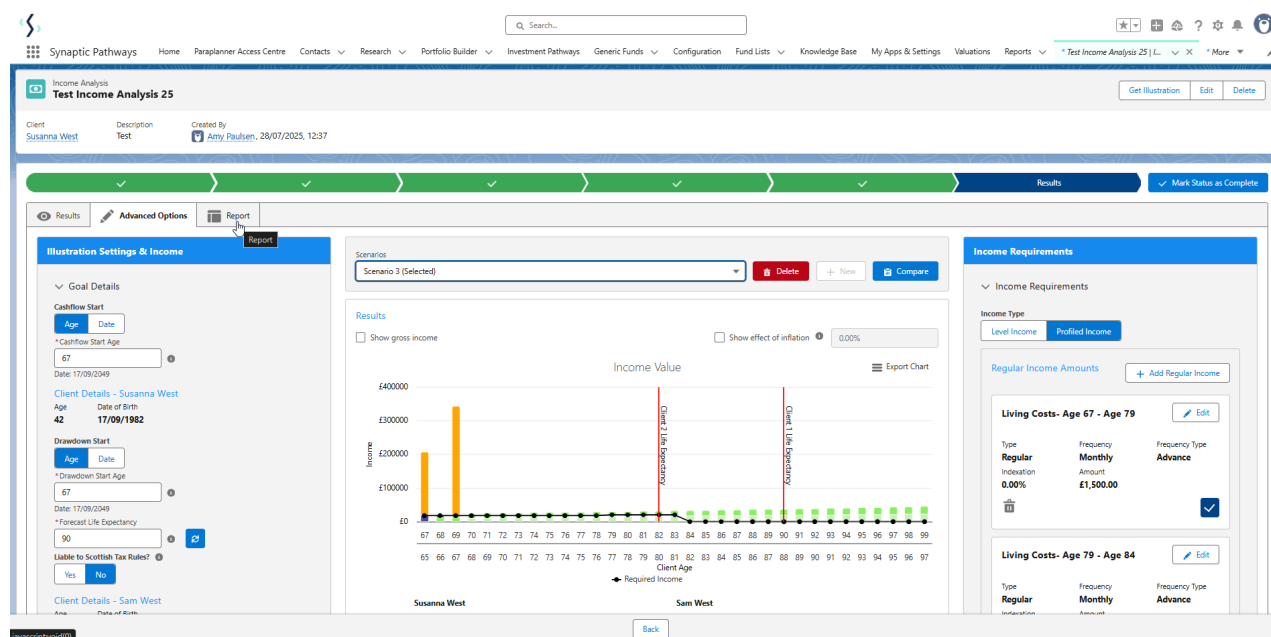


Income Analysis - Select scenarios to include in the Report

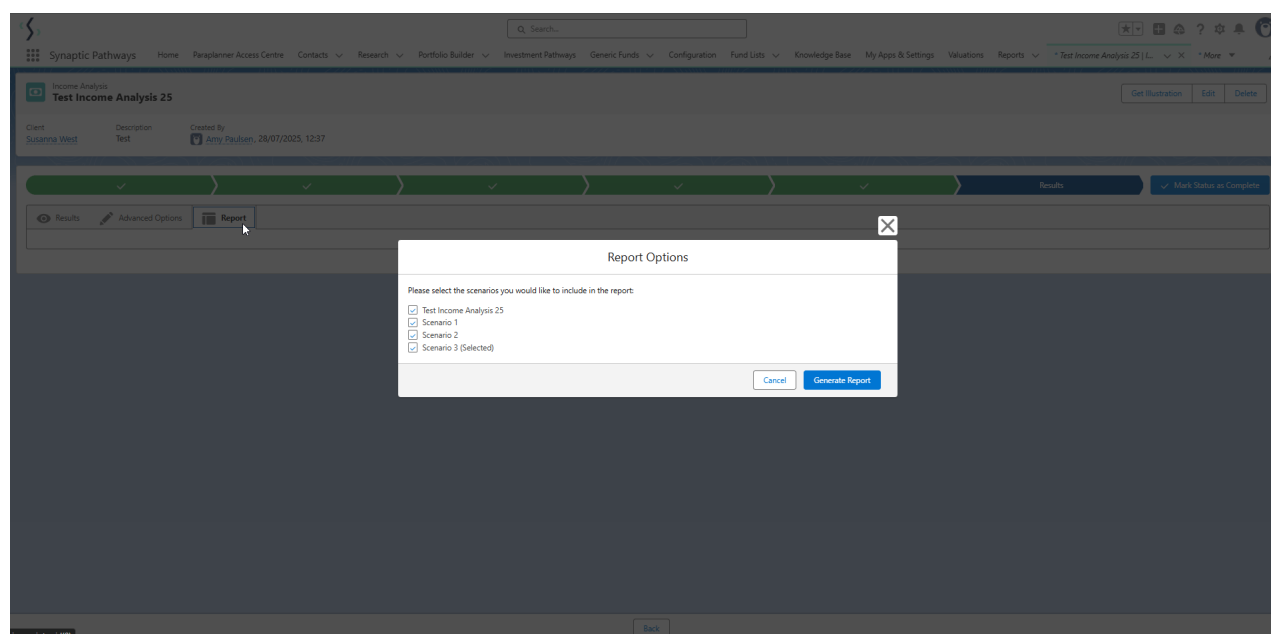
29/07/2025 12:00 pm BST

This article is a continuation of [Income Analysis - Advanced Options - Compare](#)

Once you have chosen your selected scenario, click the **Report** tab:



Report Options will appear. Here you will unselect any scenarios you don't want to appear in the Report.



Unselect and click **Generate Report**

✕

Report Options

Please select the scenarios you would like to include in the report:

☒

 Test Income Analysis 25

☐

 Scenario 1

☒

 Scenario 2

☒

 Scenario 3 (Selected)

Cancel

Generate Report

Report Options

Please select the scenarios you would like to include in the report:

☒

 Test Income Analysis 25

☐

 Scenario 1

☒

 Scenario 2

☒

 Scenario 3 (Selected)

Cancel

Generate Report

The report will load. This will include the selected scenario, as well any considered scenarios you have chosen to include.

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations Reports Test Income Analysis 25 [L] X More

Income Analysis

Test Income Analysis 25

Get Illustration Edit Delete

Client: Susanna West

Description: Test

Created By: Amy Paulsen, 28/07/2025, 12:37

✓

✓

✓

✓

✓

Results

✓ Mark Status as Complete

Results

Advanced Options

Report

Collating content for report...

Almost there – polishing up the final details for you...

Step 1 49% Complete

Back

Synaptic Pathways

HomeParaplanner Access CentreContactsResearchPortfolio BuilderInvestment PathwaysGeneric FundsConfigurationFund ListsKnowledge BaseMy Apps & SettingsValuationsReportsTest Income Analysis 25 | L | X | More

Income AnalysisTest Income Analysis 25

Get IllustrationEditDelete

ClientSusanna WestDescriptionTestCreated ByAmy Faulsen, 28/07/2025, 12:37

✓

✓

✓

✓

✓

✓

Results


✓ Mark Status as Complete

ResultsAdvanced OptionsReport

Note: The on screen formatting of this report will differ from that used when downloading the report.

Download Report

Income Analysis Report - NOT FINAL



Client 1: Susanna West

Address

1071 6th

Date Of Birth

17/09/1982

Sex

Female

Attitude to Risk

3 - Balanced

Client 2: Sam West

Address

1071 6th

Date Of Birth

16/11/1984

Sex

Male

Attitude to Risk

2 - Moderately Cautious

ATR Type

Decumulation

Report Date

29th July 2025

INTRODUCTION

This income analysis report has been based on the information contained below. If any of this information is incorrect or changes, it is likely to affect the results of the analysis. The income strategy detailed has been created to demonstrate the target income required from the investment plus other incomes, where applicable. This strategy has been created to demonstrate how long the desired target income will last.

ANNUAL CLIENT BASIC EXPENSES

Basic Cost of Living	Lifestyle Expenditure	Total Baseline Expenditure
£15,000.00	£15,000.00	£30,000.00

Back

See next article - [Income Analysis - Report](#)