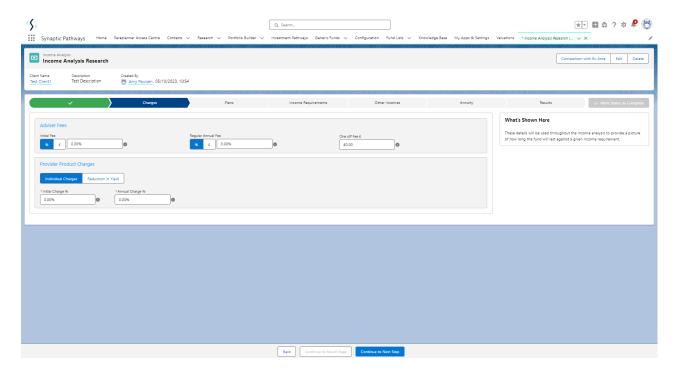
Income Analysis - Charges

Last Modified on 13/02/2024 3:35 pm GMT

This article is a continuation of Income Analysis - Add Goal Details

Complete the **Charges** area:



Adviser fees can be entered using either percentage or a monetary amount:

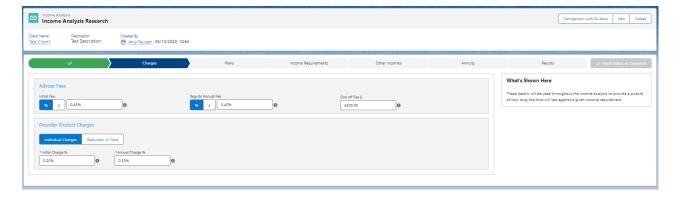


Provider Product Charges add either Individual Charges or Reduction In Yield.

Provider product charges – these are needed to calculate the charges coming out of the drawdown product. Putting values in here will give a more realistic idea of how achievable the income profile is. Values can be input either as Individual Charges or as a Reduction in Yield (RIY).

If you are using RIY as the input type, please note to give a true reflection in the results the RIY figure used should be on the same basis as the growth rate figure input.





Once complete, Continue to Next Step



For further information on Income Analysis research, see article Income Analysis - Add Plans