



# New Income Drawdown

## Matching clients' income drawdown requirements to suitable investments

Defaqto's new Income Drawdown workflow enables advisers to generate a sustainable income from a lump sum investment for their clients, over a known period. It considers the probability of volatile markets, sequencing risk, and connects to suitable investment funds.

defaqto  
engage

# Deliver more robust decumulation advice

Our new and unique Income Drawdown workflow allows you to assess the impact that drawing a regular income has on a clients' accumulated wealth.

Using the workflow you'll be able to develop a robust audit trail of:

- the clients' required income level and duration
- the sequencing risk they are prepared to take
- the potential impact of sequencing risk on longevity
- what income level is sustainable
- and a selection of suitable investment funds

## How it works

We integrate with Hymans Robertson expert analysis of the probability of volatile markets and sequencing risk to provide a comparison of three scenarios:

1. keeping the investments in the current investment solution
2. moving investments to funds specifically assessed for decumulation
3. or buying an annuity

## Benefits



**Free to engage users and includes free training and support**



**Streamlines the adviser decision-making process**



**Produces provider agnostic research specifically developed for decumulation**



**Considers the potential impact of sequencing risk on longevity**



**Consistent methodology and product research across the client lifecycle**



**Integrated with suitability reports writer and client review workflow**



**Supports advisers in providing compliant advice for clients in Income Drawdown**

## To find out more or to book a demo:



**Click here**



Call us on **01844 295 546**



Email us at **sales@defaqto.com**

defaqto  
**engage**

Accumulation | Decumulation | Protection