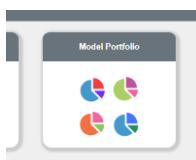


How to link clients to a Model Portfolio

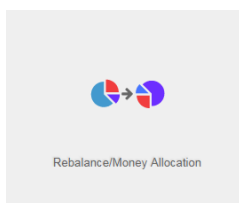
One

Click on the **Model Portfolio** icon.



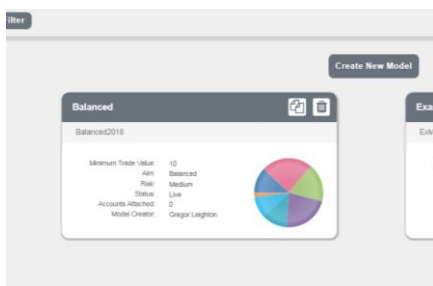
Two

Go to **Rebalance/Money Allocation**.



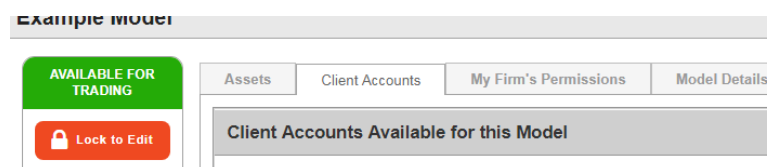
Three

Select the Model of your choice.



Four

Select the **Client Accounts** tab.



Five

Use the **Quick Search** box to find your clients' accounts. You will need to use the account number rather than a client name, so it would be wise to use the search tab in the top left-hand corner to find this first and make note of the numbers.

Having found the appropriate account(s), tick the box to the left hand side of each entry then click **Attach Selected Client Accounts to Model**.

The screenshot shows the 'Client Accounts Available for this Model' interface. On the left, there is a sidebar with a green button 'AVAILABLE FOR TRADING' and a red button 'Lock to Edit'. Below these are fields for 'Ref:', 'EvMod', 'Minimum Trade Value:', 'Aim:', 'Risk:', and 'Status:'. A pie chart is also visible. The main area has four tabs: 'Assets', 'Client Accounts', 'My Firm's Permissions', and 'Model Details'. The 'Client Accounts' tab is selected, and it displays the title 'Client Accounts Available for this Model'. Below the title is a search bar labeled 'Find: Quick search...' and a checkbox 'Only show accounts not attached to a model'. A table lists four accounts with columns: 'Account No.', 'Account Name', 'Client Name & No.', 'Adviser', 'Adviser Firm', 'Linked to Model', and 'Attach Status'. The table shows four accounts, all with 'Not attached' status. Below the table is a red button 'Attach Selected Client Accounts to Model'. Below the table is a section titled 'Client Accounts Attached to this Model' with a search bar and a message 'No records to display.' Below this section is a red button 'Detach Selected Client Accounts from Model'.

Account No.	Account Name	Client Name & No.	Adviser	Adviser Firm	Linked to Model	Attach Status
<input type="checkbox"/> A10016201		Angus Gilder - 100030006	Magnus Dijkstra	D1751 IFA Firm 100000952 Ltd		Not attached
<input type="checkbox"/> A10017017		Maya Shirley - 100031896	Miloaz Sweetman	D1751 IFA Firm 100000952 Ltd		Not attached
<input type="checkbox"/> A10017297		Jagoda Goddard - 100033426	Leyton Alexander	D1751 IFA Firm 100000952 Ltd		Not attached
<input type="checkbox"/> A10015154		Jadon Butler - 100030384	Miloaz Sweetman	D1751 IFA Firm 100000952 Ltd		Not attached

No further action is required but please note: at this stage you have linked the client to the model but you have not yet invested their account. In order to align them to your chosen model you will need to conduct a Rebalance or a Money Allocation.