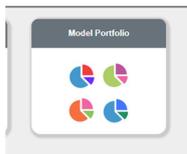


How to build a Model Portfolio

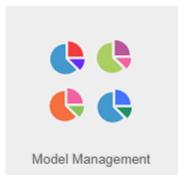
One

Click **Model Portfolio**.



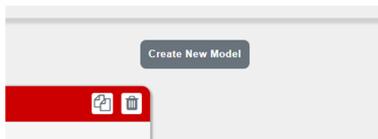
Two

Click **Model Management**.



Three

Click **Create New Model**.



Four

Enter:

A **Model Name** of your choice.

A **Model Reference** which should be an abbreviation of the Model Name.

A **Minimum Trade Value** which is the minimum threshold for trades taking place after growth/loss between rebalances. The minimum you can select is **10**.

An **Aim** and **Risk**.

Click **Save Model**.

Model Name
Example Model

Model Reference
ExModel

Minimum Trade Value
10

Aim
Balanced

Risk
Medium

Save Model

Five

Use the **Quick Search** box to find your selected funds using the ISIN code or fund name. On finding each fund, tick the box to the left hand side of the entry then click **Add Selected Asset to Model**.

Assets Available for this Model

Find: Quick search...

Name	ISIN	Type	Sector
<input type="checkbox"/> L&G Multi Index 5 Fund C Acc	GB00BHEVZ870	Unit Trust	
<input type="checkbox"/> L&G Multi Index 3 Fund C Inc	GB00BHEVZ514	Unit Trust	
<input type="checkbox"/> L&G Multi Index 5 Fund C Inc	GB00BHEVZ951	Unit Trust	
<input type="checkbox"/> L&G Multi Index 7 Fund C Inc	GB00BHEVZ719	Unit Trust	

Add Selected Asset to Model

Six

Add your chosen weightings in the boxes on the right hand side and click **Save Allocation Change**.

Assets Allocated to this Model

Find: Quick search...

Name	ISIN	Type	Sector	% Allocated	Self Allocation
<input type="checkbox"/> L&G Multi Index 7 Fund C Inc	GB00BHEVZ719	Unit Trust		0.00 %	0.00
<input type="checkbox"/> L&G Multi Index 6 Fund C Acc	GB00BHEVZD84	Unit Trust		0.00 %	0.00
<input type="checkbox"/> L&G Multi Index 3 Fund C Inc	GB00BHEVZ514	Unit Trust		0.00 %	0.00
Cash				0.00 %	0.00
Total				0.00 %	0.00

Remove Selected Assets Reset Allocation Export Assets Save Allocation Change

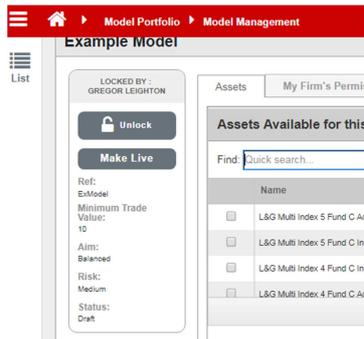
Seven

Your model is now built but there are further actions needed before it can be considered 'live'.

First:

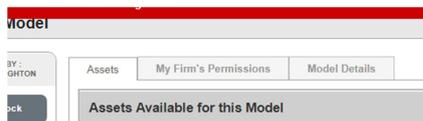
Click **Make Live**.

Click **Unlock**. This means the model can now be used for trades but **please do not exit until you have completed step Eight**.



Eight

You then need to ensure you have completed the detail for each of the tabs along the top of the page. You have already completed Model Details and Assets but now need to complete **My Firm's Permissions** before exiting. If you have clients to link you can also click **Client Accounts** and link accordingly.



Cont.



Here is the **My Firm's Permissions** screen; you can decide whether to give 'default' permissions (which means everyone at your company can take action on the model) or select colleagues for 'bespoke' permissions (which means you are entrusting particular individuals with taking actions on your behalf).

It is essential that you complete this last action as failure to do so may result in the model being unusable/un-editable in your absence.

AVAILABLE FOR TRADING

Lock to Edit

Risk: **High**
Minimum Trade Value: **50**
Alert: **Breached**
Risk: **Medium**
Status: **Low**

Created by: Aimee-Leigh Norrah Selmeyer on 03/04/2018 15:12:01
Last Edited by: Aimee-Leigh Norrah Selmeyer on 03/04/2018 15:56:41

Assets Client Accounts **My Firm's Permissions** Model Details

Set Default Model Permissions for All Users within my Firm

Attach/Remove Accounts Allocate Money Rebalance Edit Model

Users with Default Permissions

Find

User Name

- Chaharbakem Cabot
- Derrin Britton
- Donald Abbot
- Lana Saele Frev

1 - 8 of 8 items

Add Selected Users for Bespoke Permissions

Users with Bespoke Permissions

Find

User Name	Attach/Remove Accounts	Allocate Money	Rebalance	Allow Onward Share	Edit Model
<input type="checkbox"/> Aimee-Leigh Norrah Selmeyer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Abdirahman Waddington	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Anish Stanley	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Aurel Finrod	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 17 of 17 items

Remove Bespoke Permissions for Selected Users