

How to link clients to a Model Portfolio

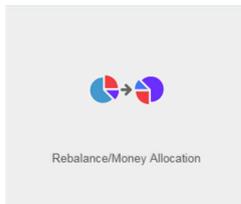
One

Click on the **Model Portfolio** icon.



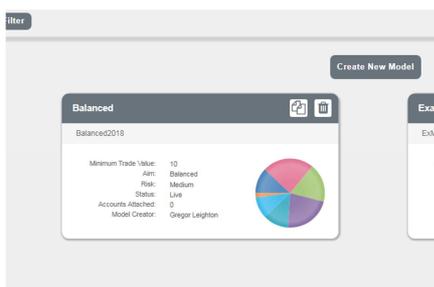
Two

Go to **Rebalance/Money Allocation**.



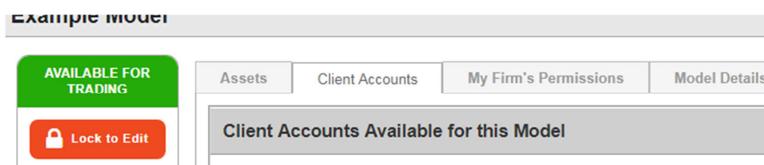
Three

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 displays a web interface for managing client accounts. On the left, there is a sidebar with a green 'AVAILABLE FOR TRADING' banner, a 'Lock to Edit' button, and a list of account parameters: Ref: Edited, Minimum Trade Value: \$0, Aims: Balanced, Risk: Medium, Status: Live. Below this is a pie chart and a log of creation and editing actions by 'Aimee-Leigh Norah Seimayer' on 03/04/2018. The main content area has tabs for 'Assets', 'Client Accounts', 'My Firm's Permissions', and 'Model Details'. The 'Client Accounts' tab is active, showing two sections: 'Client Accounts Available for this Model' and 'Client Accounts Attached to this Model'. The first section contains a table with columns for Account No., Account Name, Client Name & No., Adviser, Adviser Firm, Linked to Model, and Attach Status. It lists four accounts, all with 'Not attached' status. A search bar and a checkbox for 'Only show accounts not attached to a model' are at the top. A red button 'Attach Selected Client Accounts to Model' is at the bottom. The second section, 'Client Accounts Attached to this Model', shows a search bar and the message 'No records to display'. A red button 'Detach Selected Client Accounts from Model' is at the bottom.

Account No.	Account Name	Client Name & No.	Adviser	Adviser Firm	Linked to Model	Attach Status
<input type="checkbox"/>	A10016201	Anous Gilder - 100030506	Magnus Dilstra	D1751 IFA Firm 100000952 Ltd		Not attached
<input type="checkbox"/>	A10017017	Maya Shirley - 100031896	Milosz 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	Jedon Buller - 100030384	Milosz 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.