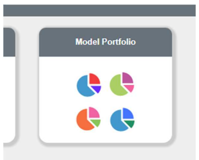
How to link clients to a Model Portfolio

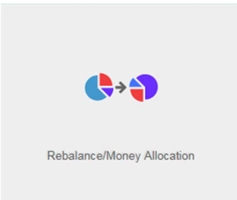
One

Click on the **Model Portfolio** icon.



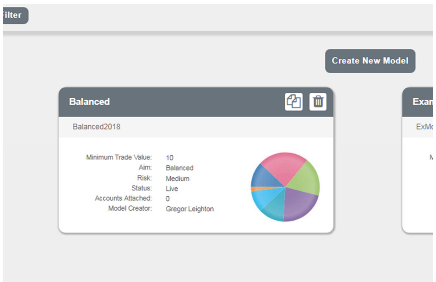
Two

Go to **Rebalance/Money Allocation**.



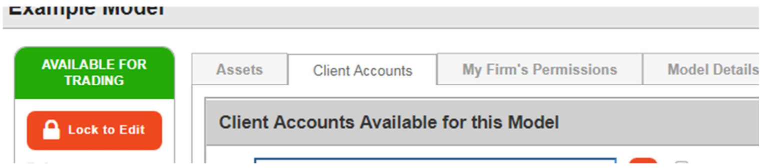
Three

Select the Model of your choice.



Four

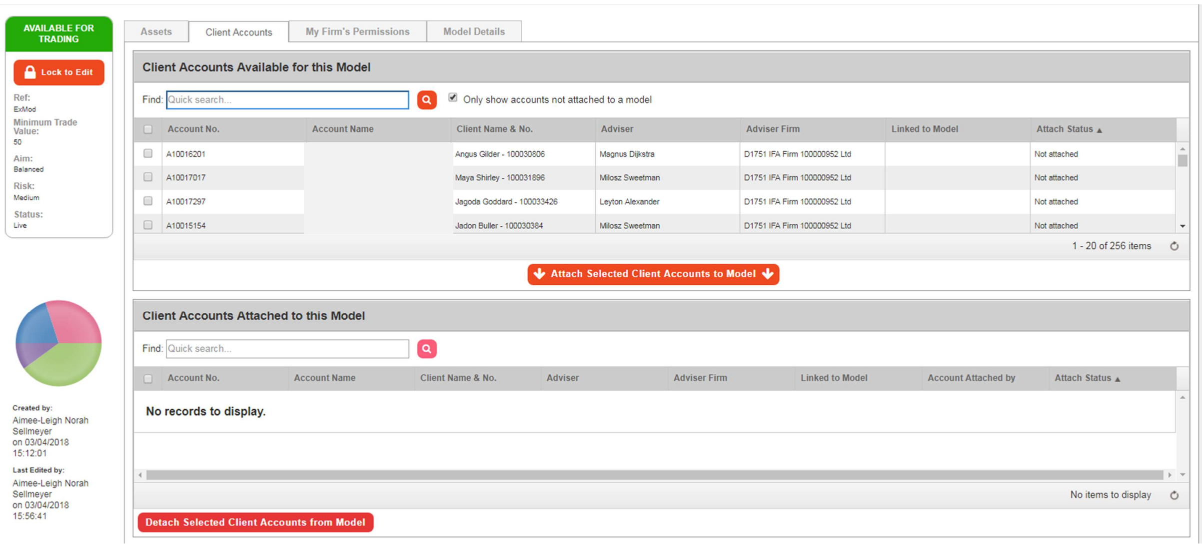
Select the **Client Accounts** tab.



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**.



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.