

Elevate

Edit a Model Portfolio

This guide shows you how to edit your model portfolios making changes to the selected investments and allocations.

Editing a model creates a new version of it which you can then upgrade clients into. Please see the **Upgrade a Model Portfolio** user guide.

For financial adviser use only.

It should not be distributed to, or relied upon by, retail clients.

Standard Life 

Edit a Model Portfolio

What you will see

The screenshot shows the Elevate Model Portfolio interface. At the top, there are navigation tabs: Summary, Portfolio, **New Work**, Cash Account, Account Holders, Transactions, and Reports & Documents. Below these are sub-tabs: Create, Work In Progress, **Work Submitted**, and Disclose And Authorise. A callout 1a points to the 'New illustration (including top-ups)' link under 'Elevate Pension Investment Account (PIA) illustrations'. Callout 1b points to the 'Model Portfolios' tab in the main navigation bar. Below the navigation is a 'Filters' section with dropdown menus for Product Wrapper (All), Model Portfolio Type (All), and Model Portfolio Status (All), and a search box. Callout 2 points to the 'All' dropdown in the Model Portfolio Type filter. Below the filters is a 'Search Results' table with columns for Model Portfolio Name, Model Portfolio Type, Model Portfolio Status, and Action. Callout 3 points to the 'Edit' action in the table. Below the search results is a 'Build Method' table with columns for Cash, Fixed Interest, UK Equities, Developed Markets, Emerging Markets, Property, Other, and Total. Callout 4 points to the 'Actual Asset Allocation' row. Callout 5 points to the 'Remove' button for the 'Stan Life Inv AmEgln I Acc' investment.

What you will need to do

- 1a. To edit **single client models**, navigate to their account and select **New Work > Create > Model Portfolios**.
- 1b. To edit **adviser/firm level models** for multiple clients, go to the **Model Portfolios** tab.
2. **Search** for the model portfolio you wish to edit in **Filters**.
3. Click **Edit** to open up the model portfolio wizard.
4. Adjust allocations by amending the percentages.
5. Remove an investment by clicking **Remove**.

Notes

- 1a. By editing your client's model portfolio you will create a new version of that model. To move clients from the old version into the new model (and to redirect future payments) you will need to complete a separate model **Upgrade** process.
- 1b. Not available to adviser firms set up on Elevate after 5 June 2017.
3. By clicking **Edit**, the model version will be sequentially renumbered (i.e. v1 to v2).

4. Make sure the **Total Amount Allocated** is 100%.

Edit a Model Portfolio

What you will see

Search for Investments

Search Criteria: Search

Search Type: Standard Life Funds

Investment documents, KIDs and KIDs

Name:

Code:

Fund Manager: All

Search Results: 96

Type	Code	Name	OOF/TER	Fund Manager	Net/Gross	Allocate And Select
Investment Fund	SL78	Stan Life Inv AAA Inc Inst Acc	0.83	0.0000	Net	25 % select
Investment Fund	N5MJ	Stan Life Inv AmEgln I Acc	0.89	0.0000	Net	25 % select
Investment Fund	N5MV	Stan Life Inv AmEgln I Inc	0.89	0.0000	Net	25 % select
Investment Fund	SL61	Stan Life Inv Arm Eq Uncon I	0.87	0.0000	Net	25 % select
Investment Fund	SL60	Stan Life Inv Arm Pk Gth Inst	1.07	0.0000	Net	% select

Model Portfolio Scan Documents

Document	Date requested	Status
Model Portfolio Scan		Unrequested

Generate new Portfolio Scan 2.0 [Generate](#)

Process complete - Test Model

For further model portfolio work please select one of the following options

[Set permissions](#) [View Model Portfolios](#) [Create New Model Portfolio](#)

[Exit](#) [Back](#)

What you will need to do

- Use **Search Criteria** and click **Search** to find new funds that you want to add to model portfolio.
- Allocate a percentage for the chosen fund and click **select**.
- Move to **step 10. Submit**. Here you can illustrate key investment information by generating a Model Portfolio scan document. Click **Generate**, then click **Complete** to open, view and print the document.
- Check the details are correct and click **Submit Model** to confirm your changes.

Notes

- When all changes have been made, you can go straight to **Step 10. Submit**. Or, if you want to view information on the selected investments you can click **Next** through each step.
- With the process complete you can either exit at this point or use the links provided to **Set Permission Settings** (for adviser/firm level models only), **View Model Portfolios** or **Create New Model Portfolio**.

Hints and tips

- For adviser/firm level model portfolios, the new version created will use the same permission settings as the old version unless amended. Once the new model version has been submitted, you can update these settings via **Set Permissions** (if you have the appropriate level of access).
- Once you have created a new version of the model you will need to perform an **Upgrade** to move existing client holdings from the old version into the new one. Please refer see **Upgrade a Model Portfolio** user guide.

- It is only possible to edit a current version of a model portfolio – historic versions cannot be changed.
- An alert is triggered for accounts where a new version of a model portfolio is available.

Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm.

If there is anything more you want to know, please contact us.

Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at enquiries@elevateplatform.co.uk

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