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.

Standard Life

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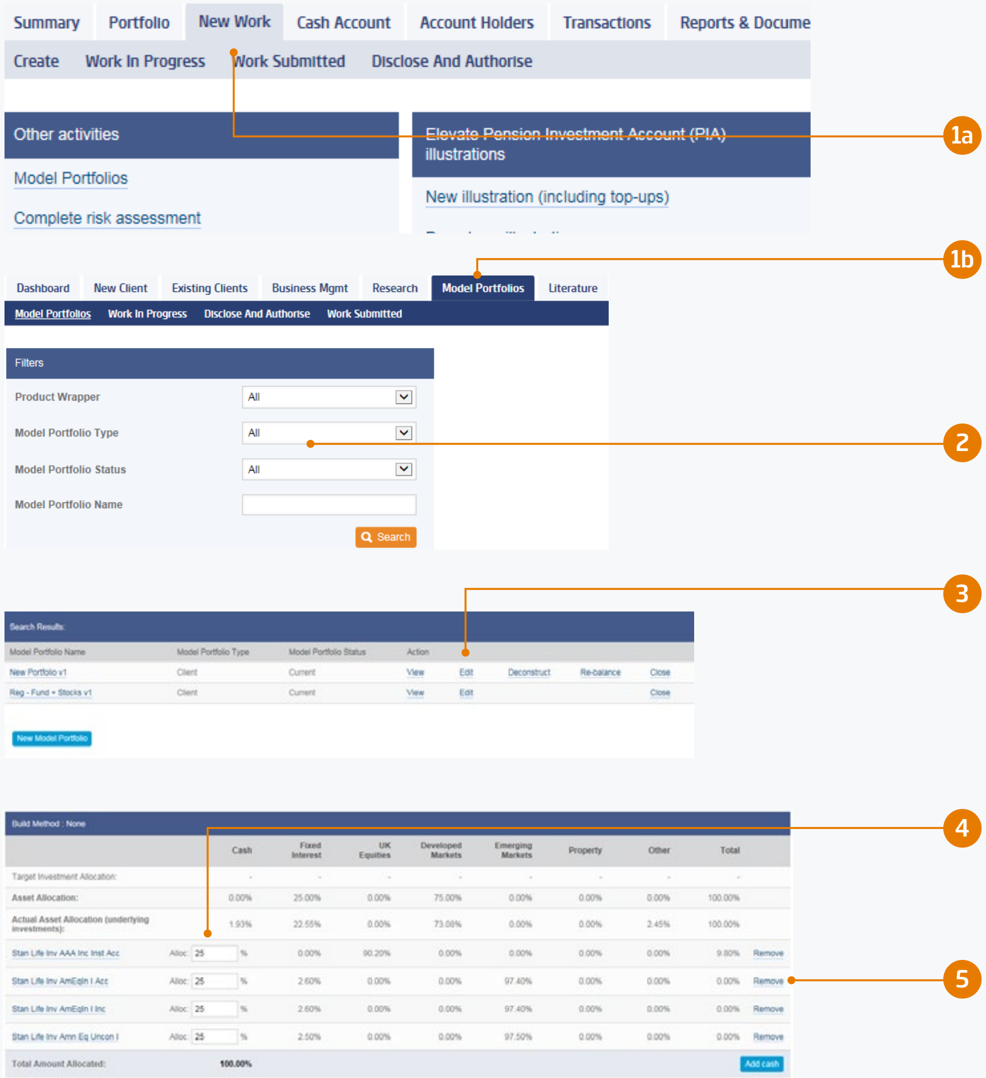
What you will see



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%.

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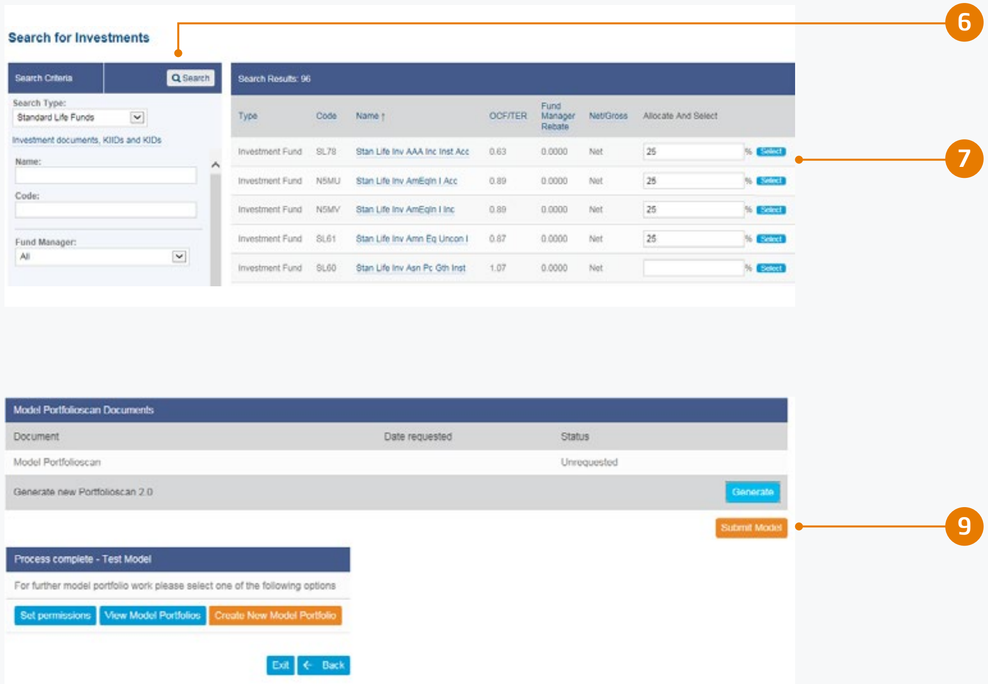
What you will see



What you will need to do

6. Use **Search Criteria** and click **Search** to find new funds that you want to add to model portfolio.
7. Allocate a percentage for the chosen fund and click **select.**
8. 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.
9. Check the details are correct and click **Submit Model** to confirm your changes.

Notes

7. 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.
9. 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.

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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.

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