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Elevate help guide: Add existing investments into a model portfolio

This guide shows you how to move compatible investments held by a client into a model portfolio structure without any trades taking place.

Standard Life
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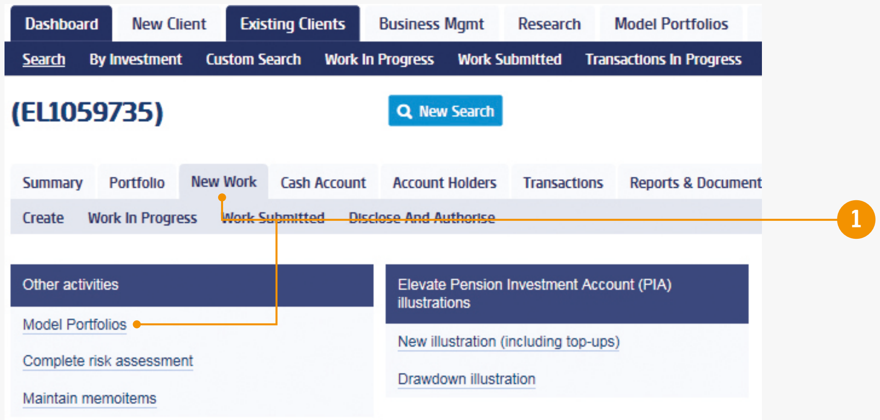
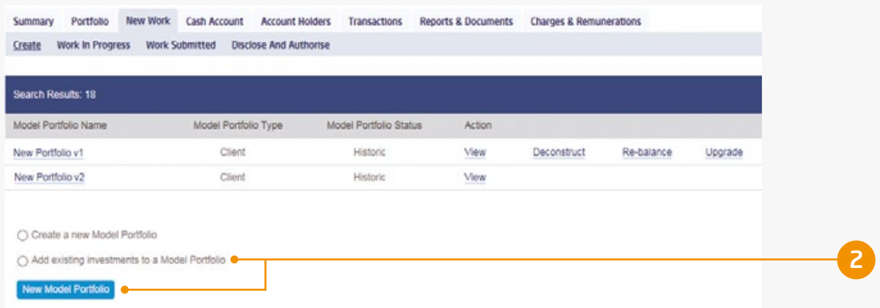
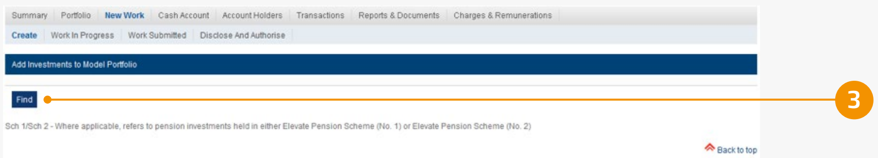
Moving existing investments into a model portfolio

What you will see







What you will need to do

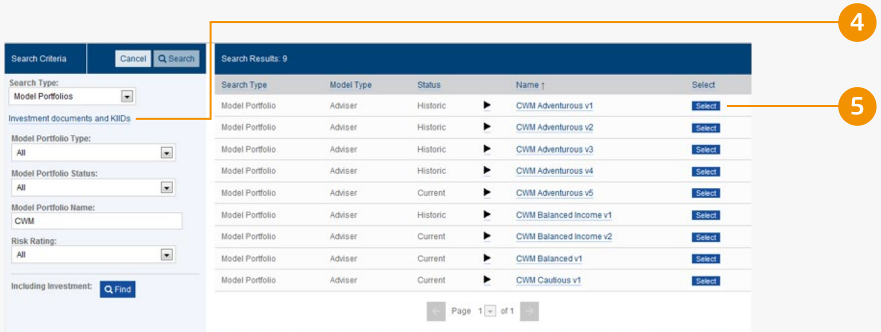
1. Go the client's account and select **New Work › Create › Model Portfolios**.
2. Select **Add existing investments to a Model Portfolio** and click **New Model Portfolio**.
3. Click **Find**.

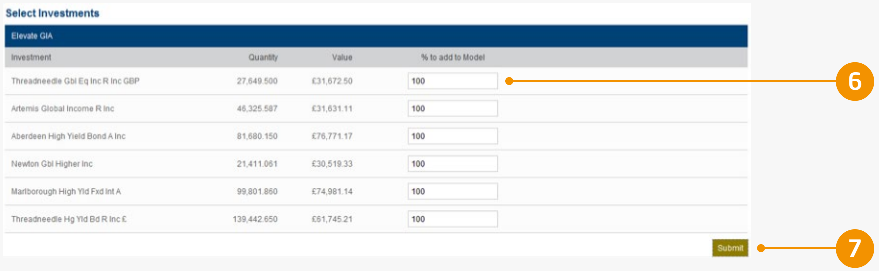
Notes

You can move a client's separately held investments into a model portfolio structure if they are compatible with your model portfolio allocations.

3. A pop-up window will be displayed where you can search for the applicable model.

What you will see





What you will need to do

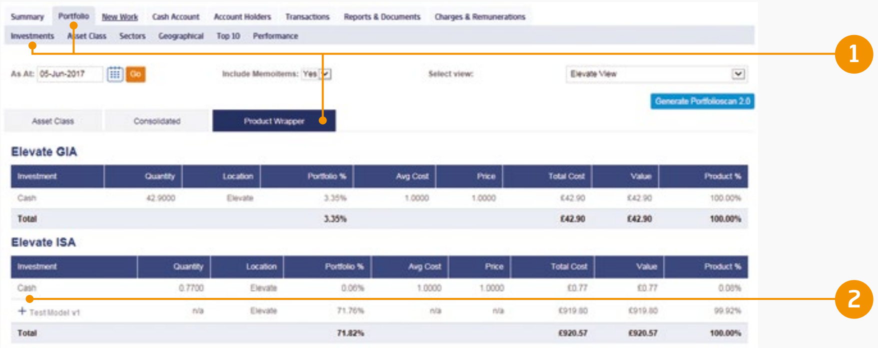
4. Use the **Search Criteria** to find the model that you want to use.
5. **Select** the model you want to use.
6. In **Select Investments**, you can move any matching assets that your client currently holds into the model portfolio by selecting the percentage to be moved.
7. Click **Submit**.

Notes

5. The investments that make up the model portfolio will be displayed.
7. You'll be asked to confirm that you wish to proceed.

Viewing model portfolios and other investments

What you will see



What you will need to do

1. In the client's account, go to **Portfolio › Investments** and click on the **Product Wrapper** tab.
2. Click **+** expand next to the model portfolio to see the underlying investments.

Notes

HINTS AND TIPS

- Investments will be moved into the model portfolio – but no trades will take place.
- Once you have added the investment(s) to the model portfolio, the model structure may no longer match the original asset allocation and they may 'drift' further over time. You can rebalance (or upgrade) which will switch the required investments returning the model to the original asset allocation.
- If there are any other investments that cannot be moved because they are not compatible with your model, you can 'switch' them into the model using the normal switch process – see **Switching Investments** user guide.

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Address

Elevate, PO Box 6877, Basingstoke, RG24 4RT

elevateplatform.co.uk

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