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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**

There's a lot to look forward to

# Moving existing investments into a model portfolio

## What you will see

The screenshot shows the Elevate client portal interface. At the top, there is a navigation menu with tabs: Dashboard, New Client, Existing Clients, Business Mgmt, Research, and Model Portfolios. Below this is a search bar with the text "(EL1059735)" and a "New Search" button. The main content area has a sub-navigation menu: Summary, Portfolio, New Work, Cash Account, Account Holders, Transactions, and Reports & Document. Under "New Work", there are buttons for "Create", "Work In Progress", "Work Submitted", and "Disclose And Authorise". A callout box labeled "1" points to the "Create" button. Below this, there are sections for "Other activities" (Model Portfolios, Complete risk assessment, Maintain memoitems) and "Elevate Pension Investment Account (PIA) illustrations" (New illustration (including top-ups), Drawdown illustration). A "Filters" section is visible, with dropdown menus for Product Wrapper, Model Portfolio Type, Model Portfolio Status, and Model Portfolio Name. Below the filters is another navigation menu: Summary, Portfolio, New Work, Cash Account, Account Holders, Transactions, Reports & Documents, and Charges & Remunerations. Under "New Work", there are buttons for "Create", "Work In Progress", "Work Submitted", and "Disclose And Authorise". A "Search Results: 19" section shows a table with columns: Model Portfolio Name, Model Portfolio Type, Model Portfolio Status, and Action. The table contains two rows: "New Portfolio v1" (Client, Historic, View, Deconstruct, Re-balance, Upgrade) and "New Portfolio v2" (Client, Historic, View). Below the table are radio buttons for "Create a new Model Portfolio" and "Add existing investments to a Model Portfolio". A callout box labeled "2" points to the "Add existing investments to a Model Portfolio" option, which has a "New Model Portfolio" button next to it. Below this is another navigation menu: Summary, Portfolio, New Work, Cash Account, Account Holders, Transactions, Reports & Documents, and Charges & Remunerations. Under "New Work", there are buttons for "Create", "Work In Progress", "Work Submitted", and "Disclose And Authorise". A "Add Investments to Model Portfolio" section is visible, with a "Find" button. A callout box labeled "3" points to the "Find" button. At the bottom, there is a footer with the text "Sch 1/5ch 2 - Where applicable, refers to pension investments held in either Elevate Pension Scheme (No. 1) or Elevate Pension Scheme (No. 2)" and a "Back to top" button.

## What you will need to do

1. Go to 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

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Search Type	Model Type	Status	Name 1	Select
Model Portfolio	Adviser	Historic	CWM Adventurous v1	Select
Model Portfolio	Adviser	Historic	CWM Adventurous v2	Select
Model Portfolio	Adviser	Historic	CWM Adventurous v3	Select
Model Portfolio	Adviser	Historic	CWM Adventurous v4	Select
Model Portfolio	Adviser	Current	CWM Adventurous v5	Select
Model Portfolio	Adviser	Historic	CWM Balanced Income v1	Select
Model Portfolio	Adviser	Current	CWM Balanced Income v2	Select
Model Portfolio	Adviser	Current	CWM Balanced v1	Select
Model Portfolio	Adviser	Current	CWM Cautious v1	Select

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Investment	Quantity	Value	% to add to Model
Threadneedle Gbl Eq Inc R Inc GBP	27,649,500	£31,672.50	100
Artemis Global Income R Inc	48,325,587	£31,631.11	100
Aberdeen High Yield Bond A Inc	81,680,150	£78,771.17	100
Newton Gbl Higher Inc	21,411,051	£30,519.33	100
Marlborough High Yld Fxd Int A	99,801,860	£74,981.14	100
Threadneedle Hg Yld Bd R Inc C	139,442,650	£61,745.21	100

## 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

The screenshot shows the 'Investments' section of the software. At the top, there are navigation tabs: Summary, Portfolio, New Views, Cash Account, Account Holders, Transactions, Reports & Documents, and Charges & Remunerations. Below these are sub-tabs: Investments, Asset Class, Sectors, Geographical, Top 10, and Performance. The 'As At' date is set to 05-Jun-2017. There are buttons for 'On', 'Include MemoItems: Yes', and 'Select view: Elevate View'. A 'Generate PortfolioScan 2.0' button is also present. The 'Asset Class' section shows 'Consolidated' and 'Product Wrapper' (highlighted with a red circle and '1'). Below this are two tables: 'Elevate GIA' and 'Elevate ISA'. The 'Elevate ISA' table has a '+' icon next to it (highlighted with a red circle and '2').

Investment	Quantity	Location	Portfolio %	Avg Cost	Price	Total Cost	Value	Product %
Cash	42.9000	Elevate	3.35%	1.0000	1.0000	£42.90	£42.90	100.00%
<b>Total</b>			<b>3.35%</b>			<b>£42.90</b>	<b>£42.90</b>	<b>100.00%</b>

  

Investment	Quantity	Location	Portfolio %	Avg Cost	Price	Total Cost	Value	Product %
Cash	0.7700	Elevate	0.06%	1.0000	1.0000	£0.77	£0.77	0.06%
+ First Blood v1	n/a	Elevate	71.76%	n/a	n/a	£919.80	£919.80	99.92%
<b>Total</b>			<b>71.82%</b>			<b>£920.57</b>	<b>£920.57</b>	<b>100.00%</b>

## 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.

## Get to know us better

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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.

### Email us at [Elevate\\_Enquiries@standardlife.com](mailto:Elevate_Enquiries@standardlife.com)

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

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