User Guide – Switch to or from Account Models

YOU Asset Management models are available on YOUR Platform. Switching into, out of and between models is done by advisers and adviser support users, directly on the platform.

Step by step

- Access the account in question on the platform from either the 'Accounts' or 'Clients' buttons at the top of the page.
- Click the button with three dots underneath Action and select Edit Account from dropdown options
- You will then see the Account details screen
- Within the Account Management section (you can access this quickly by pressing Account Management on the left-hand side), there you'll find a check box for Model Portfolio
- This should be checked to move into a model, and unchecked to leave one
- Do not amend the Adviser Management option, this allows adviser charges and manages client trading access
- When entering or changing model use the Model drop down to select the model required
- You will see a warning when changing or adding a model, this is because any change will trigger a rebalance to the account
- Once happy click Review and check the changes
- Once checked click Update Account and the model will be changed/added/removed
- For account additions or changes, this will trigger trades
- For accounts being de-linked no trades will take place so you should now instruct any switches needed for the client being advised away from the model or they will remain invested as per the latest allocation with no further DFM rebalances