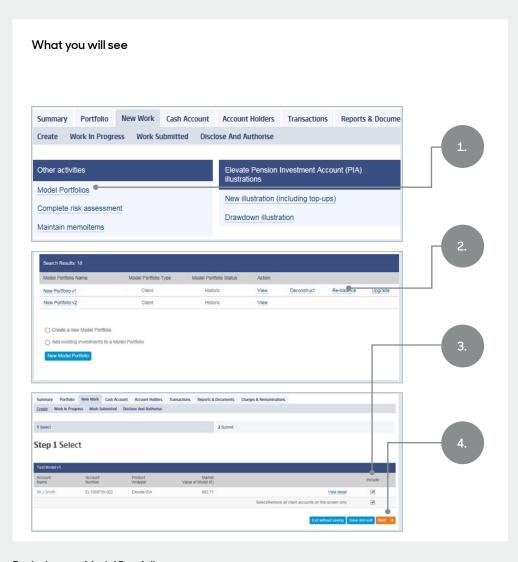# Elevate help guide
Re-balance a Model Portfolio

Over time, as markets rise and fall, model portfolio investments drift from the original asset allocation. This guide shows you how to re-balance a model portfolio back to its original asset allocation.

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Step 1. Select – Single client re-balance

What you will see

What you will need to do

To re-balance your client's model portfolio:

1. Navigate to their account and select **New Work > Create > Model Portfolios**

2. Find the model portfolio and click **Re-balance** to open the model portfolio wizard.

3. For each applicable product wrapper select the products that you wish to re-balance.
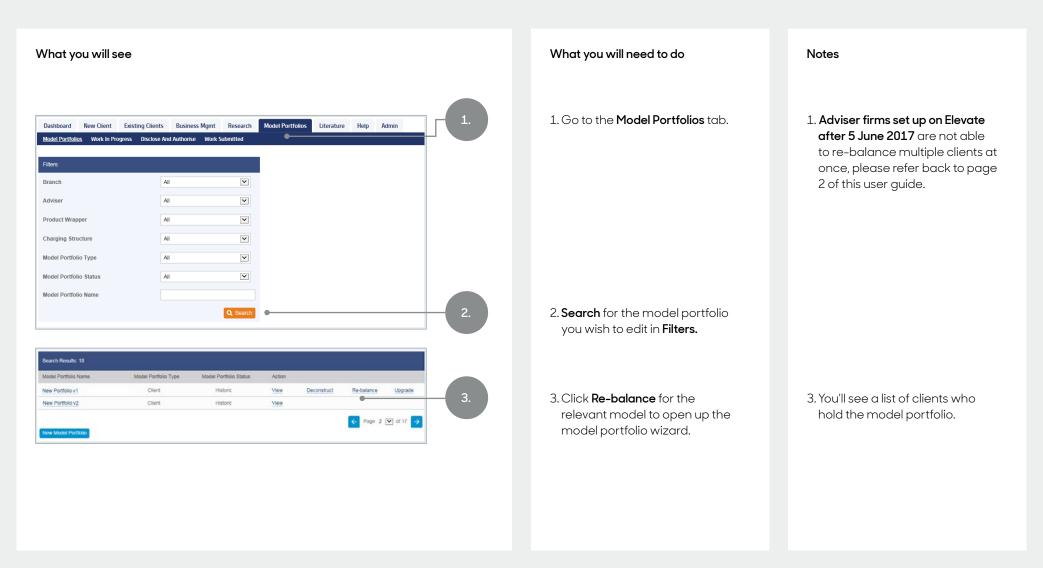
4. Click **Next.**
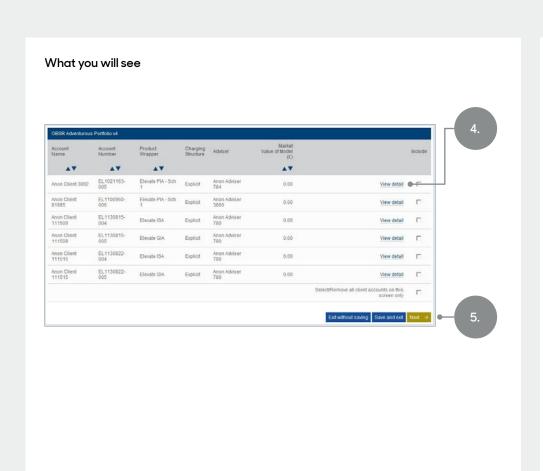
5. **Proceed to Step 2 of this user guide on page 4.**

Notes

2. You can use the filters to help find the model portfolio you want to re-balance.

3. Click **View detail** to see the impact of the re-balance on the investments held inside the model.

Step 1. Select – Bulk client re-balance

What you will see

What you will need to do

1. Go to the **Model Portfolios** tab.

2. **Search** for the model portfolio you wish to edit in **Filters.**

3. Click **Re-balance** for the relevant model to open up the model portfolio wizard.

Notes

1. **Adviser firms set up on Elevate after 5 June 2017** are not able to re-balance multiple clients at once, please refer back to page 2 of this user guide.

3. You'll see a list of clients who hold the model portfolio.

Step 1. Select – Bulk client re-balance – cont.

What you will see
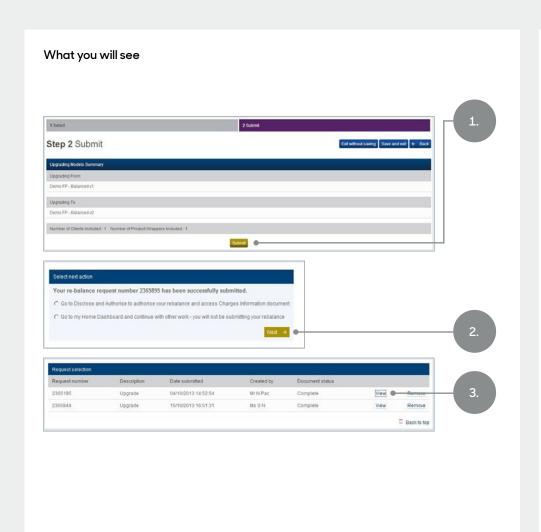

What you will need to do

4. Tick to select the accounts you want to include in the re-balance.

5. Click **Next.**

Notes

4. Click **View detail** to see the impact of the re-balance on the investments held inside the model.

Step 2. Submit

What you will see

What you will need to do

1. Check the details are correct and click **Submit Model** to confirm your changes.

2. In **Select next action**, tick **Disclose and Authorise.**

3. Click **View** to show the re-balance. You can also **Remove** any that have been selected by mistake.
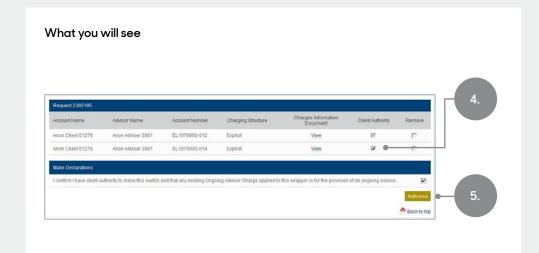
Notes

1. Accounts will not be re-balanced until you complete the **Disclose and Authorise** process.

2. If you return to your **Home Dashboard,** the re-balance will not complete. You can resume this by navigating to the **Disclose and Authorise** tab.

Step 2. Submit – cont.

What you will see

What you will need to do

4. Tick to confirm **Client Authority.**

5. If everything is correct,
   click **Authorise.**

**The model portfolio will be
re-balanced at the next
trading point.**

Helpful hints

- A re-balance will place the required trades to bring the portfolio back to the original asset allocation. It will only sell and rebuy what is required to do this.
- If there are orders pending, you will have to wait until those trades settle before re-balancing.
- If the Disclose and Authorise step is not submitted within 30 calendar days, any pending deals associated with the rebalance will be cancelled automatically and you will need to re-submit the process.

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 9am to 5pm, Monday to Friday.
As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@abrdn.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.

Address

Elevate, PO Box 6877, Basingstoke, RG24 4RT

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