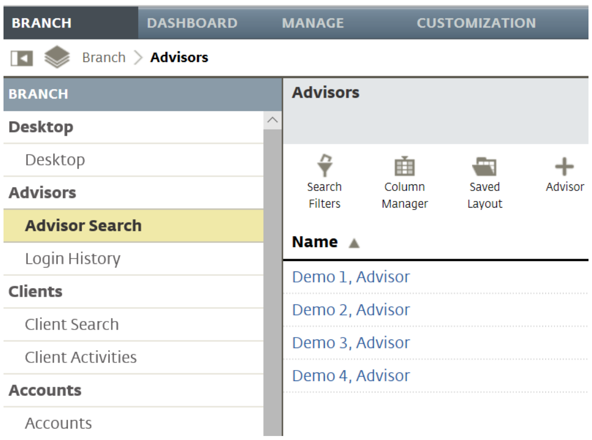
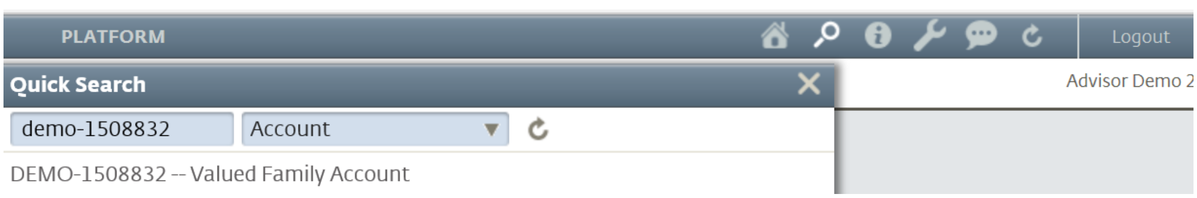
MODIFY GOAL

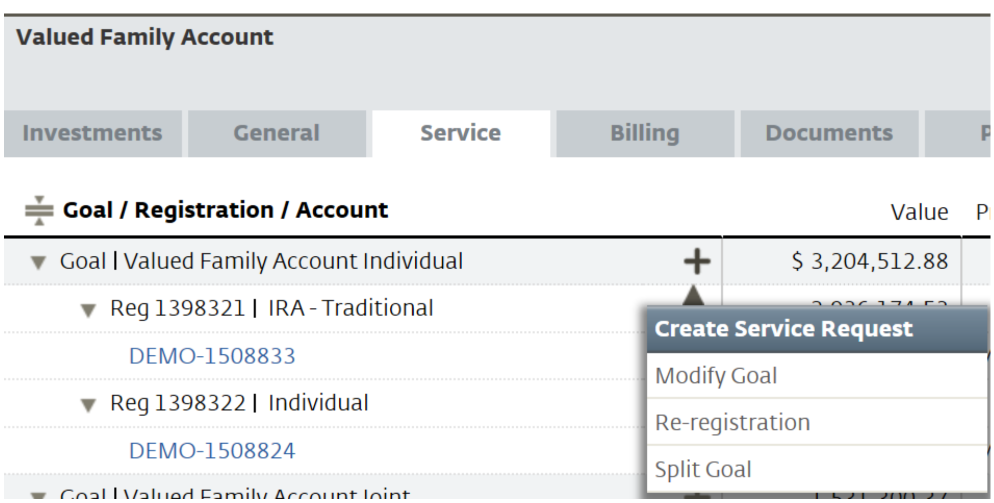
1. Launch into the Advisor's Portal via Advisor Search
    - You will see the Advisor's Name in the top right-hand corner if you have done this correctly.



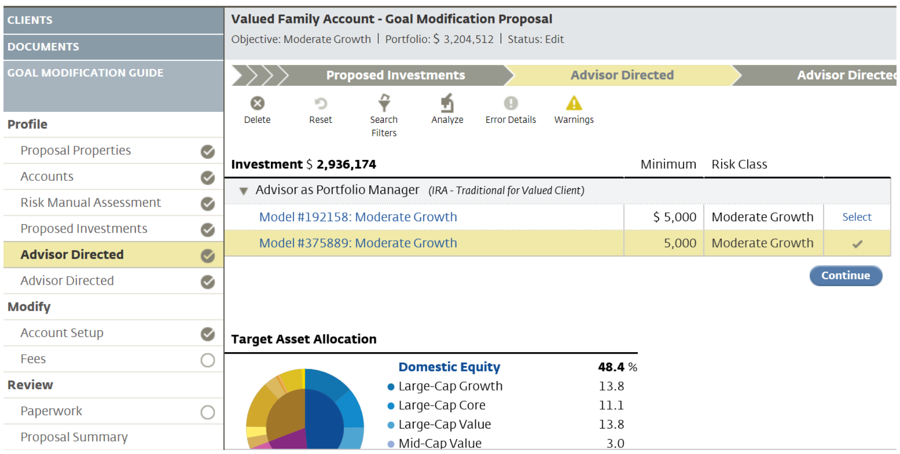
2. Search for the account that is Changing Programs via quick search or Client Tab



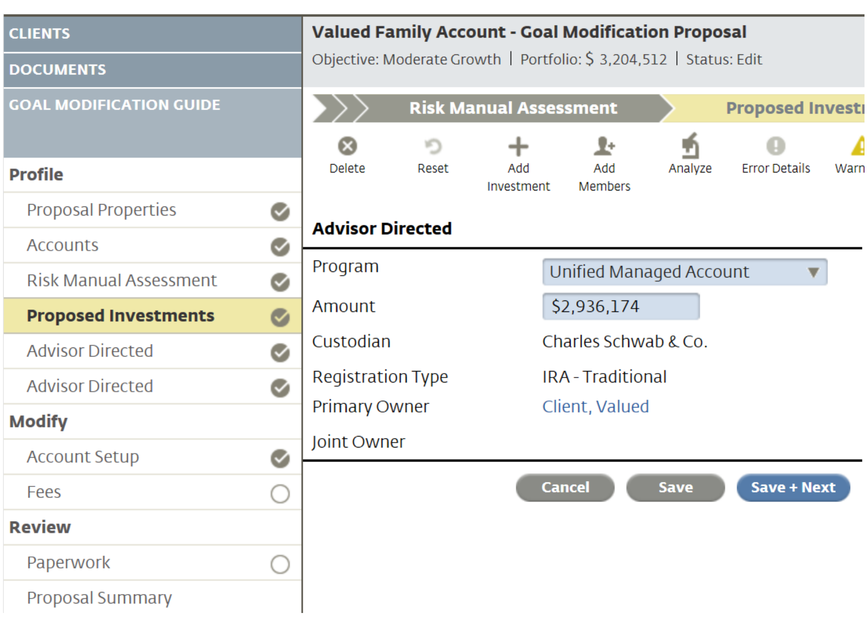
3. Navigate to the **Service Tab**
    - Click the **"+"** icon at the goal level
    - Select **Modify Goal**



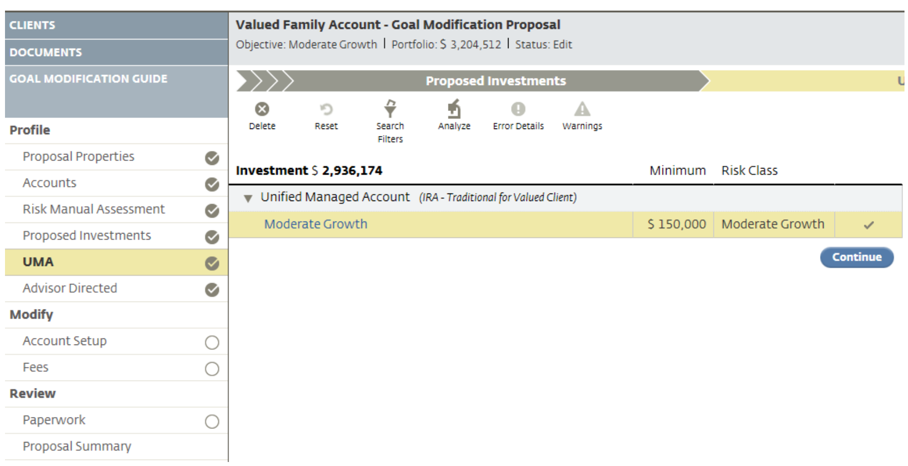
4. The Goal Modification Guide: ***APM to UMA, SMA, FSP***
    - Click on the **Proposed Investments** workspace



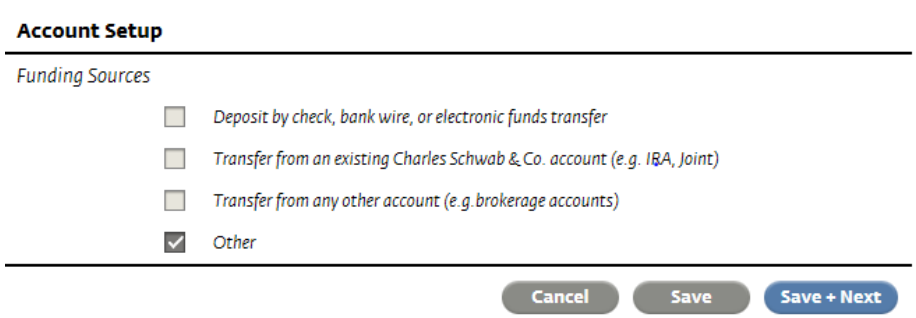
5. Proposed Investments:
    - Click **Edit**
    - Select the NEW Program (Existing UMA in this example)
        - Unified Managed Account – if you are choosing an existing UMA Model
        - Build Unified Managed Account – if you are building a Custom UMA
        - Advisor as Portfolio Manager – if you are choosing an existing APM Model
        - Build Advisor as Portfolio Manager – if you are building a Custom APM
        - Separate Accounts – choose if you are just using SMA's
        - FSP Programs – if you are choosing an FSP
        - LibertyFi PMC Foundation – PMC's Foundation Portfolio's
    - Click **Save + Next**



6. UMA, SMA, FSP, or APM:
    - Existing UMA model - click **Select** by the appropriate UMA model
    - New Custom UMA – search for the appropriate Sleeve's. Can have APM, SMA, & FSP sleeves in the same account.
    - SMA: search for the appropriate manager(s).
    - FSP: click Select by the appropriate FSP model
    - Advisor Directed: select the appropriate APM model
    - Click **Continue**



7. Account Setup: Select a Funding Source
    - Click **Save + Next**

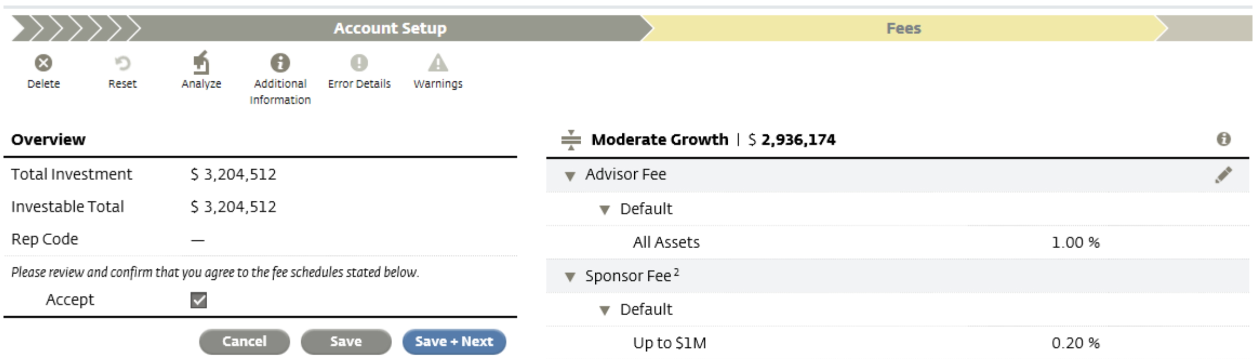


LIBERTYFI

CHEAT SHEET

MODIFY GOAL

8. Fees:
    - Review the Fee schedule, click the **“Pencil”** icon to edit if necessary
    - Check **Accept**
    - Click **Save + Next**



9. Paperwork:
    - Click **Generate**
    - Click **Submit Request**
    - The new SIS needs to be signed and returned to paperwork@LibertyFi.com