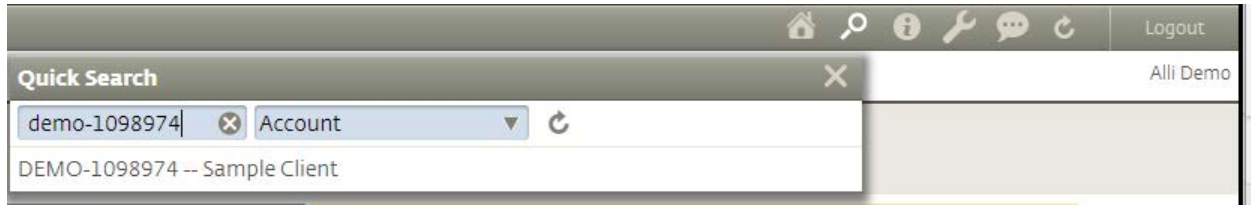


## UMA SMA FSP Protect Cash

1. Search for the account via Quick Search or Client Tab



2. Navigate to the **Service Tab**
  - Click the “+” icon next to the registration from which you are raising cash
  - Select **Raise Cash**

Sample Client																																																															
Investments	General	Service	Documents																																																												
<table border="1"> <thead> <tr> <th>Goal / Registration / Account</th> <th></th> <th>Value</th> <th>Product</th> </tr> </thead> <tbody> <tr> <td>▼ Goal   Sample Client Individual</td> <td>+</td> <td>\$ 23,858.59</td> <td></td> </tr> <tr> <td>    ▼ Reg 743046   Individual</td> <td>+</td> <td>23,858.59</td> <td></td> </tr> <tr> <td>        DEMO-1098975</td> <td></td> <td>23,858.59</td> <td>Vanguard</td> </tr> <tr> <td>▼ Goal   Sample Client IRA - Roth</td> <td>+</td> <td>92,077.89</td> <td></td> </tr> <tr> <td>    ▼ Reg 743045   IRA - Roth</td> <td>+</td> <td>92,077.89</td> <td></td> </tr> <tr> <td>        DEMO-1098974</td> <td></td> <td>92,077.89</td> <td>FSP Capit</td> </tr> <tr> <td>▼ Goal   Sample Client IRA - Roth</td> <td></td> <td></td> <td></td> </tr> <tr> <td>    ▼ Reg 743047   IRA - Roth</td> <td></td> <td></td> <td></td> </tr> <tr> <td>        DEMO-1098971</td> <td></td> <td></td> <td></td> </tr> <tr> <td>▼ Goal   Sample Client IRA - Traditional</td> <td></td> <td></td> <td></td> </tr> <tr> <td>    ▼ Reg 743048   IRA - Traditional</td> <td></td> <td></td> <td></td> </tr> <tr> <td>        DEMO-1098972</td> <td></td> <td></td> <td></td> </tr> <tr> <td>▼ Goal   Sample Client IRA - Traditional</td> <td></td> <td></td> <td></td> </tr> <tr> <td>    ▼ Reg 743044   IRA - Traditional</td> <td></td> <td>100,169.03</td> <td></td> </tr> </tbody> </table>				Goal / Registration / Account		Value	Product	▼ Goal   Sample Client Individual	+	\$ 23,858.59		▼ Reg 743046   Individual	+	23,858.59		DEMO-1098975		23,858.59	Vanguard	▼ Goal   Sample Client IRA - Roth	+	92,077.89		▼ Reg 743045   IRA - Roth	+	92,077.89		DEMO-1098974		92,077.89	FSP Capit	▼ Goal   Sample Client IRA - Roth				▼ Reg 743047   IRA - Roth				DEMO-1098971				▼ Goal   Sample Client IRA - Traditional				▼ Reg 743048   IRA - Traditional				DEMO-1098972				▼ Goal   Sample Client IRA - Traditional				▼ Reg 743044   IRA - Traditional		100,169.03	
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**Create Service Request**

- Raise Cash
- Invest Contribution
- Rebalance Account
- Terminate (Liq/Hold)
- Systematic Withdrawal - Set Up New
- DCA Set Up New
- Trade Hold

UMA SMA FSP Protect Cash

3. Properties: Enter the Protect Cash Amount, Raise Cash Option, & Withdrawal Method

- Protect Cash Tips:
  - Choose Raise Cash to Increase Protected Cash as Raise Cash Option
  - Choose FA/Client will process withdrawal as Withdrawal Method
- Click **Save + Next**

**Raise Cash | SR# 960756 |**  
Sample Client - Reg 743045 - IRA - Roth

**Properties**

Delete An Element
 Additional Information

**Properties**

SR #	<b>960756</b>
Owner	Demo Family Member-3
Amount	<input type="text" value="10000"/>
Raise Cash Option	<input type="text" value="Raise Cash to increase Protected Cash"/>
Withdrawal Method	<input type="text" value="Distribution instructions will be provided later"/>
Special Instructions <sup>1</sup>	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>

Cancel Save Save + Next

4. Trade Values: Review the Trade Values and click **Continue**

5. Review & Submit: Click **Submit Request**

- This will trigger the money manager or UMA portfolio to raise the appropriate cash to be protected

**Properties** **Trade Values**

Delete An Element
 Column Manager
 Saved Layout
 Additional Information
 Generate A CSV File
 Manage Service Request

Investment	Value	Cash	Prot. Cash	Trade Value	Prot. Cash Change
▼ DEMO-1098974	\$ 92,077.89	\$ 2,116.94	\$ 0.00	\$ -10,000.00	\$ 10,000.00
S&P Capital Appreciation MAP - ETF - Mox	\$ 92,077.89			\$ -10,000.00	

Submit Request

