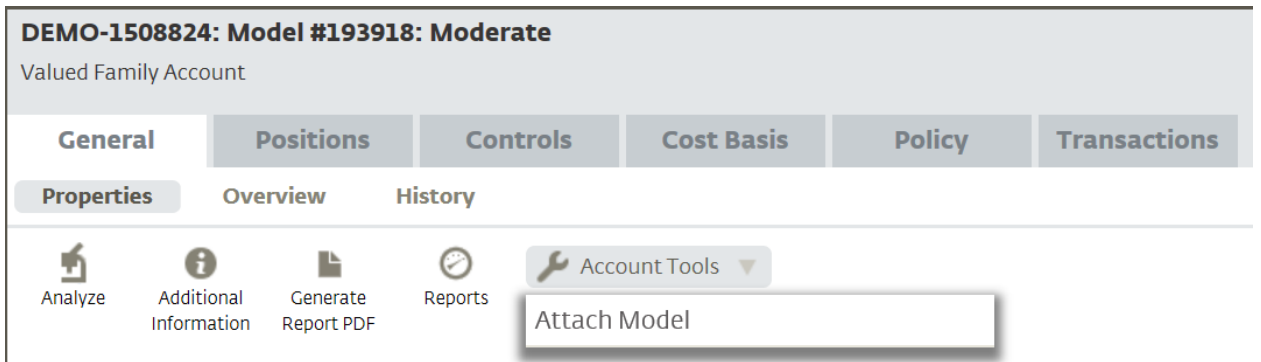


APM TO APM MODEL CHANGE

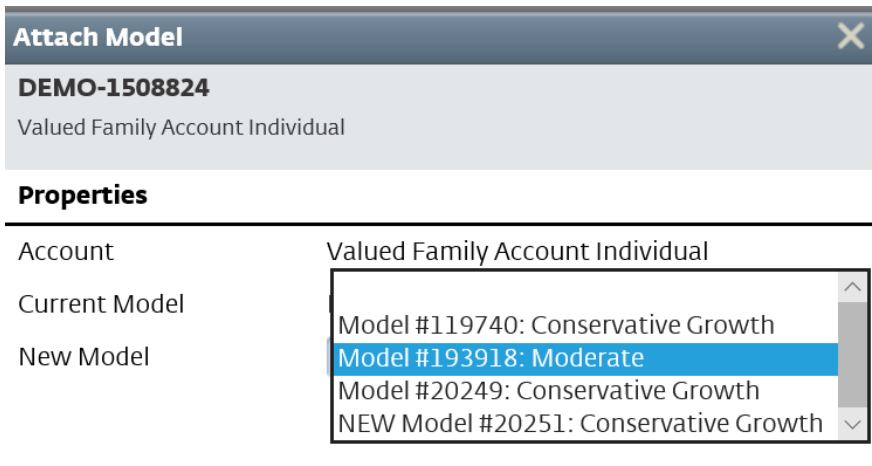
1. Search for the account via quick search or Client Tab



2. Navigate to the **General Tab** (account level)
 - Click on the **Account Tools**
 - Select **Attach Model**

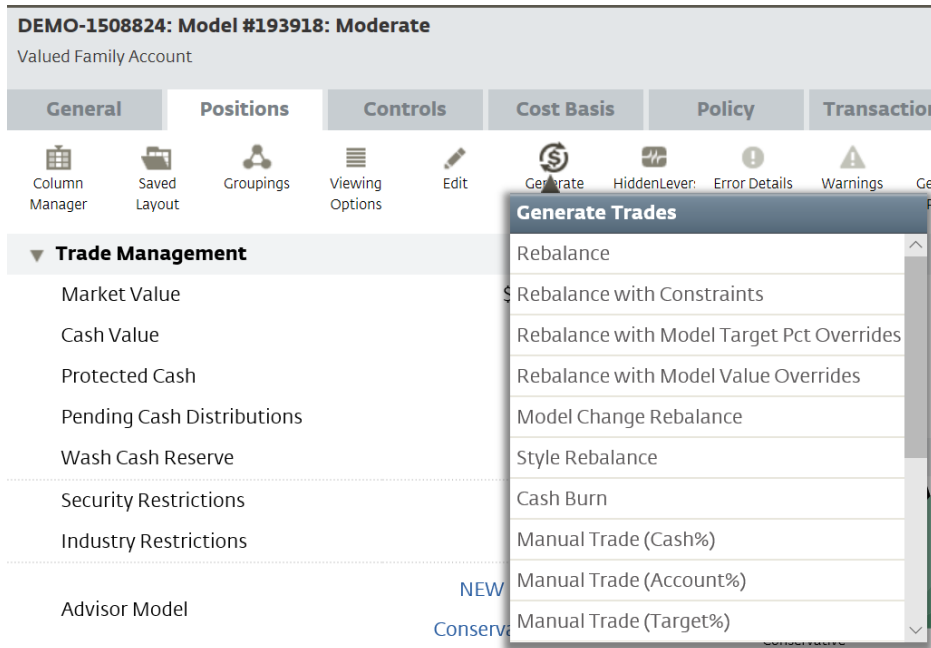


3. Attach the New Model
 - Click **Save**, if another pop up opens, click **Continue**
 - The New APM model is now attached – now it is time to rebalance

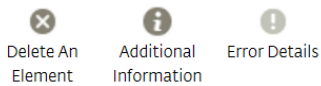


APM TO APM MODEL CHANGE

4. Rebalance: Click on the **Positions Tab**
 - Select the icon **“Generate Trades”**
 - Select **Rebalance**



5. Generate Trades: Click **Generate Trades**



Generate Trades


Once the trade settings shown below have been reviewed, use the **Generate Trades** button to create trades.





APM TO APM MODEL CHANGE

6. Trade Summary:

- Review Trades
- Once Reviewed, Click **View Trades**


 Delete An Element


 Additional Information


 Error Details

[View Trades](#)

Trade Summary	View Trades
Total Portfolios	1
Total Portfolios Reviewed	1
Total Portfolios with Trades	1
Total Portfolios Excluded	0
Total Trades Recommended	22

7. Trade Generation: Select **Manage Trades**, then click **Submit Trades**

Trade Generation

Portfolios

Trades

22 1 - 22

Delete An Element

Search Filters

Column Manager

Saved Layout

Groupings

Additional Information

Accounts With Trade

Generate A PDF File

Generate A CSV File

Trade Summary

Manage Trades

Account	Client	Account Name
Totals		
<input type="checkbox"/> DEMO-1508824	Client, Valued	Valued Family Accour
<input type="checkbox"/> DEMO-1508824	Client, Valued	Valued Family Accour
<input type="checkbox"/> DEMO-1508824	Client, Valued	Valued Family Accour

Global Actions

- Submit Trades
- Waive Fees
- Reset Waive Fees

Global Cancel

- Cancel All Trades