

UMA SMA FSP RAISE CASH

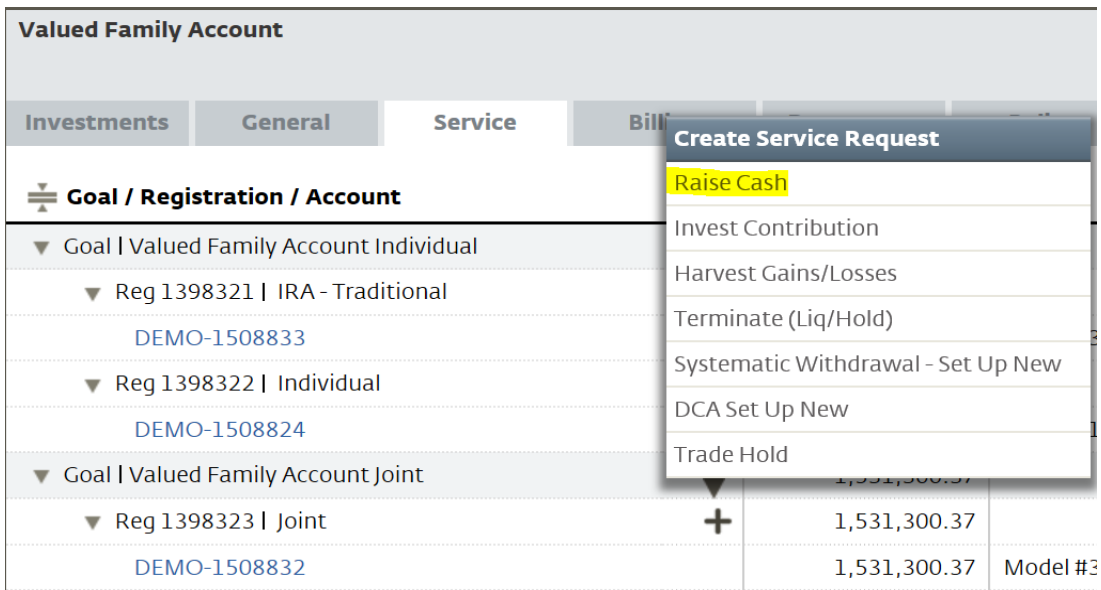
\*\*\* You will have the option to (1) Raise Cash to withdraw, (2) Raise Cash for a future date, (3) Raise Cash to Increase Protected Cash, (4) Raise cash to withdraw and increase the Protected Cash, and (5) Use Existing Cash to withdraw. See Raise Cash Options in Step 3 for further details.

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**



UMA SMA FSP RAISE CASH

3. **Properties:** Enter the Withdrawal Amount, Raise Cash Option, & Withdrawal Method
  - **Withdrawal Method Tips:**
    - **Raise Cash Options:**
      - 1) Raise Cash to Withdraw
      - 2) Raise Cash for Withdraw at future date – choose raise cash to withdraw option, then type exact details into Special Instructions Box
      - 3) Raise Cash to Increase Protected Cash
      - 4) Raise Cash to Withdraw and Increase Protected Cash
      - 5) Use Existing Cash to Withdraw
    - FA/Client will process withdrawal – Finish the raise cash request. Once you see the cash at the custodian level, you can now send to the client.
  - **Click Save + Next**

**Properties**

✕ Delete An Element
ℹ Additional Information

---

**Properties**

SR # **1262209**

Owner Valued Client , Demo Family Member-2

Amount

Raise Cash Option

Withdrawal Method

Special Instructions

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 appropriate cash

Investment	Value	Cash	Prot. Cash	Trade Value
▼ DEMO-1508832	\$ 1,531,300.37	\$ 38,765.59	\$ 0.00	\$ -10,000.00
Model #357003: Moderate <span style="color: yellow; font-weight: bold;">!</span>	\$ 1,531,300.37			\$ -10,000.00

**Submit Request**

