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| **pProcedure Name:**  | **Remove Security Restrictions****(Advisor Model Portfolio)** | **A picture containing text, clipart  Description automatically generated** |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** |  Katie Weinschenk |

**Description**

When a restriction can be lifted in order to trade the fund in the account, we will follow these instructions to remove the security restriction.

**Assumptions**

N/A

**Procedure**

1. From the Wealth Management Platform, search for the account in question
2. From the Service tab, click on the hyperlinked account number
3. Click on the Controls screen
4. All Restrictions will appear in the Account Restrictions area
5. To remove the restriction,
	1. Click on the gear next to the ticker symbol



* 1. Click on Remove Restriction
	2. Select Yes to confirm you wish to delete the trade restriction
1. The restriction will no longer appear in the Controls tab

**References**

N/A

**Revision History**

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| --- | --- | --- |
| **Revision Date** | **Revised By** | **Revision Notes** |
| 11/14/2022 | Katie Weinschenk | Procedure Created |
|   |   |   |