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| **Procedure Name:** | **Goal Modification**  **(Genesis Model Portfolio)** | **A picture containing text, clipart  Description automatically generated** | |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** | Katie Weinschenk |

**Description**

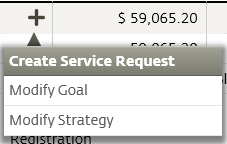
To change the model in a Genesis Model Portfolio account, use the following instructions.

**Assumptions**

N/A

**Procedure**

1. In the client’s household, click on the Service Tab
2. Click on the first + next to the account in question and select Modify Goal



* 1. Choose the new model that fits in the appropriate risk category
  2. Edit the fees to ensure they remain the same

1. Click Generate Paperwork
2. Go to the Account Allocation tab
   1. Click the Gear
   2. Click Select Account and select the correct account number
3. Go back to the paperwork tab
   1. Click the Submit Paperwork button
   2. This will automatically send the paperwork to the back office for review

**References**

N/A

**Revision History**

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