|  |  |  |
| --- | --- | --- |
| **Procedure Name:**  | **AMP Model Change** |  |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** |  Katie Weinschenk |

**Description**

To change the model in an AMP account, use the following instructions.

**Assumptions**

N/A

**Procedure**

1. In WMP, pull up the account needing a model change. Prior to changing the model, confirm any security restrictions that may need to be placed in the account with the financial advisor
2. From the General tab, click on Account Tools and click Attach Model



1. The Attach Model screen will appear. Use the dropdown menu next to New Model to select the appropriate model and select Save



1. A confirmation screen will pop up. It will ask you to confirm the model change if you are in the same risk classification or alert you if you are attaching a model with a new risk classification. Review and click Continue



1. Click on the Positions tab
2. Click on Generate Trades and select Rebalance



1. Click the Generate Trades button



1. This will take you to the Trade Settings – Soft Rebalance screen. Click Review Trades, expand the trades, and confirm the buys and sells
2. If everything looks good, click Manage Trades and Submit Trades

**References**

N/A

**Revision History**

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