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| **Procedure Name:** | **Protect Cash in AMP Accounts** |  | |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** | Katie Weinschenk |

**Description**

For AMP accounts, cash can be protected for future distributions or if the client wishes to maintain a higher level of cash than the percentage allocated to the model.

**Assumptions**

N/A

**Procedure**

1. From the client’s account in WMP, click on the Positions tab
2. Click the Edit Button and select Edit Protected Cash

Graphical user interface, application

Description automatically generated

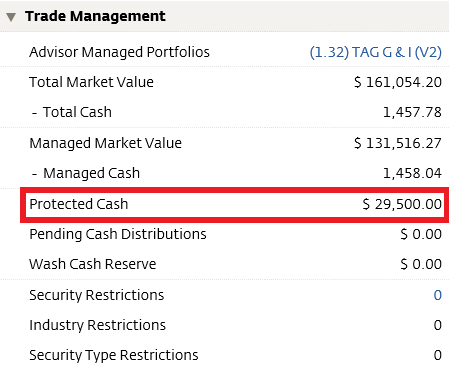
1. The Update Protected Cash Screen will appear

Graphical user interface, application

Description automatically generated

* 1. Enter the amount of cash you want to protect
  2. Click Save

1. The Protected Cash position will automatically update and be visible in Trade Management



**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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