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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



1. The Update Protected Cash Screen will appear



* 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 |
|   |   |   |