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| **Procedure Name:**  | **Advisory Asset Movement** | **A picture containing text, clipart  Description automatically generated** |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** |  Katie Weinschenk |

**Description**

When moving money from one advisory account to another, certain steps need to be completed in order to insure everything gets taken care of in a timely fashion.

**Assumptions**

List assumptions here.

**Procedure**

1. Request a Raise Cash by entering a **03 – ADV Raise Cash Request** activity into Redtail
2. Complete paperwork and send to client for e-signature/schedule appointment for physical signature
3. Verify asset movement is complete in NetX
4. Request the funds be invested in the model by entering a **03 - ADV INVEST ACCOUNT(S) IN MODEL** activity in Redtail
5. Verify funds are invested in receiving account model

**References**

N/A

**Revision History**

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