Creating and reporting on model portfolios

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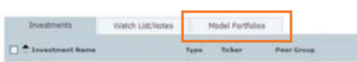
Ensure you have the right client type

Your client's Client Type must be "Retirement Plan – Participant Directed," for the Model Portfolio tab to appear.



Create a new model

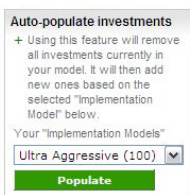
Client- Specific
- Name
- Rebalancing Frequency
- $ Assets
- # Participants
- Blended Benchmark

Add investments to the model #1

The plan lineup is listed on the left. Add investments to the model on the right.

Add investments to the model #2

Use stored models with Auto-populate the model.

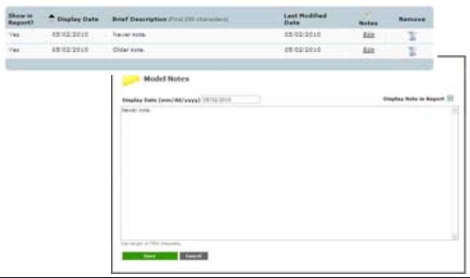


Create a Blended Benchmark

Available indices are on the left. Add indices to the benchmark on the right.

Create Model Portfolio Notes

Create and store multiple model notes.



Create a Model Report

Model Portfolios Report