For financial advisers only

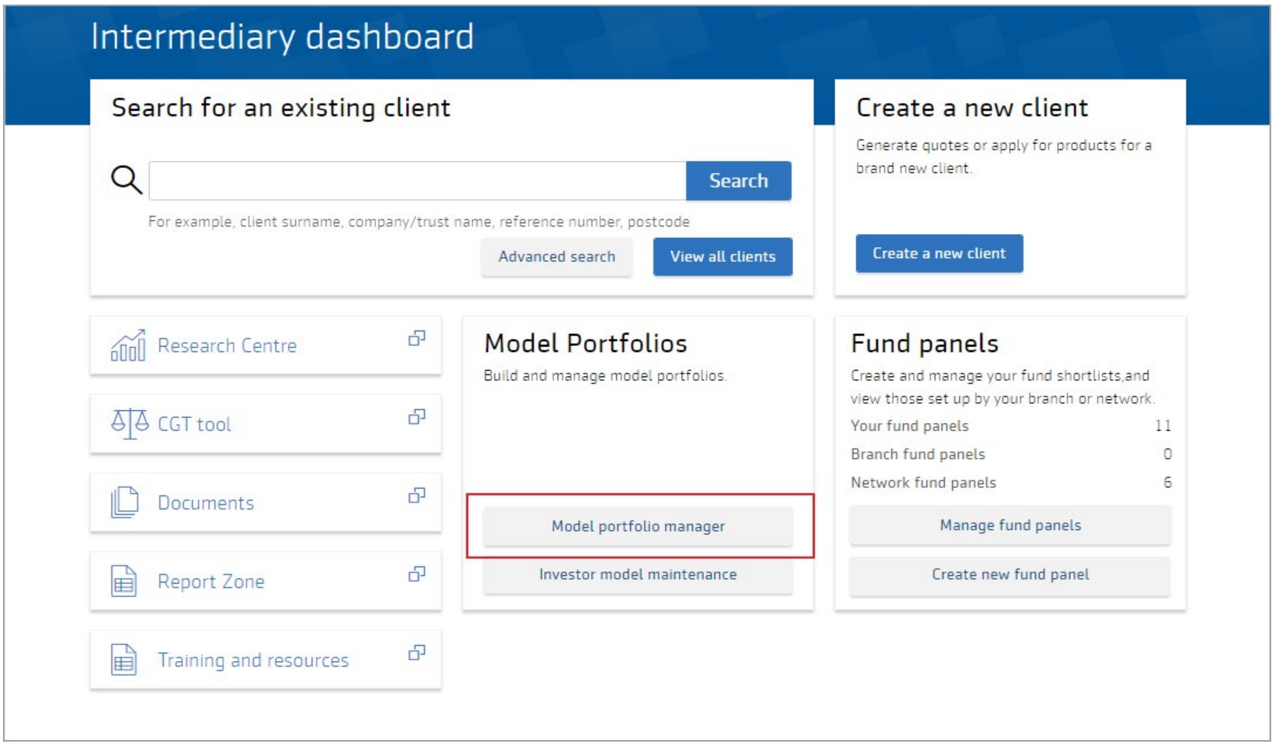
How do I… create a model portfolio?

Model portfolios allow you to design a panel of funds based on your client's needs. And, with it all online you can quickly track how the funds are performing and make changes easily if you need to.

Use this step-by-step guide to create a model portfolio on the Aegon Platform.

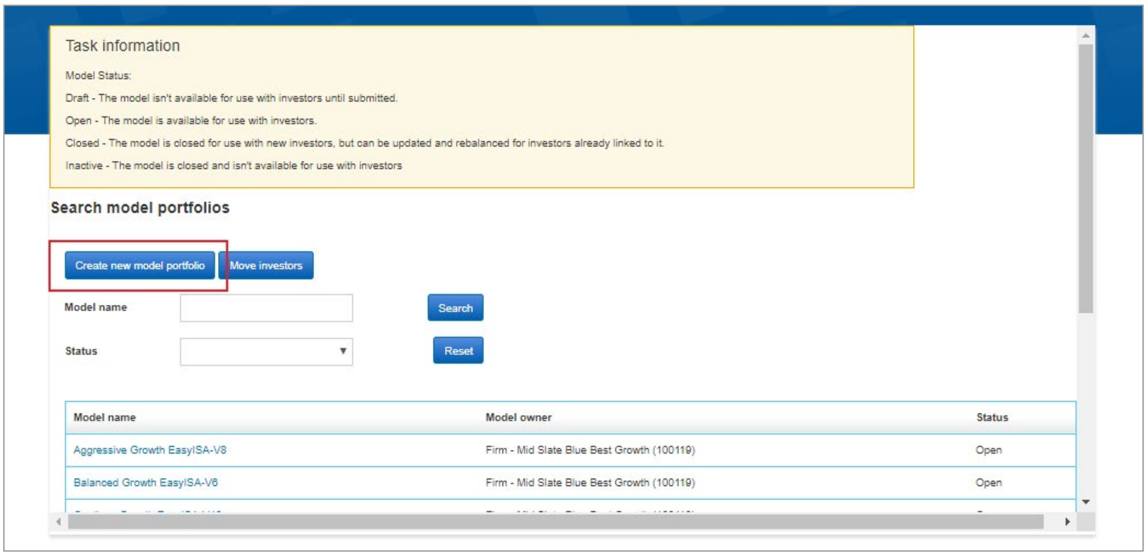
Create a model portfolio

1 Sign in to your dashboard and select **Model portfolio manager**.

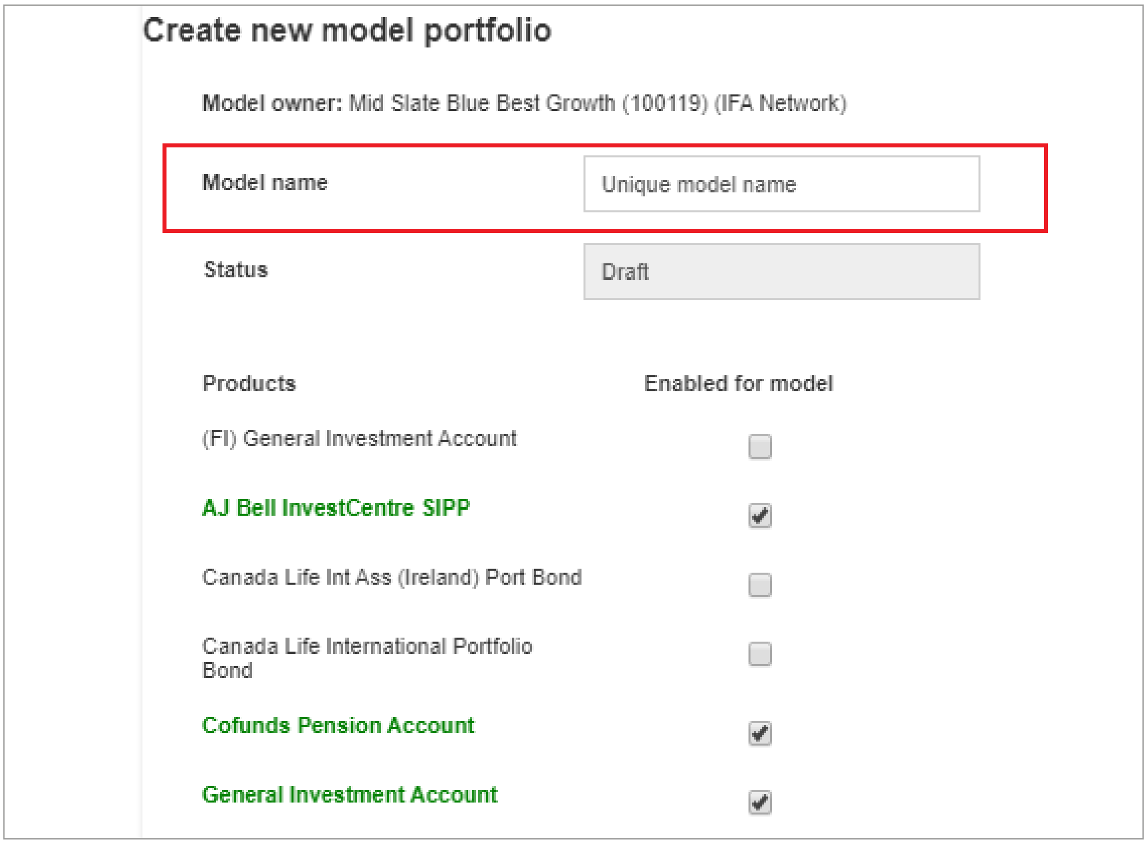


AEGON

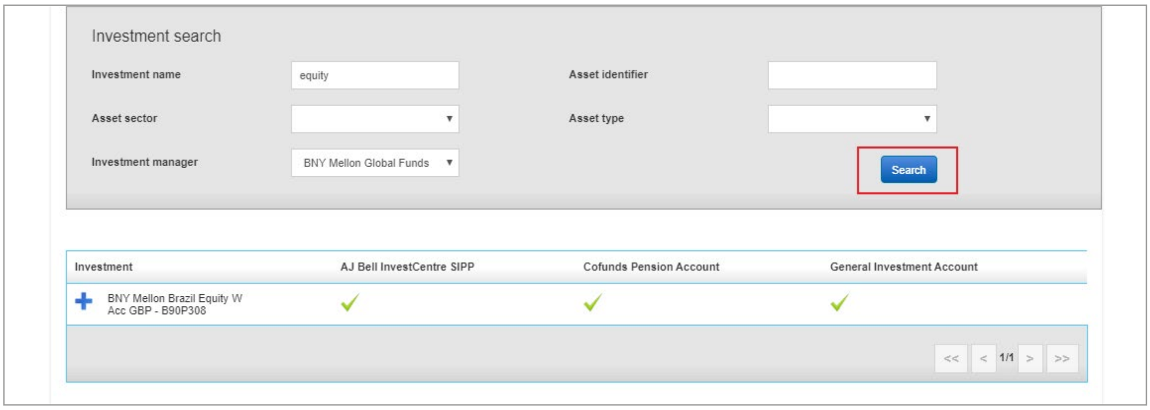
2 Here you can search for, create and view model portfolios. Use the table to see your firm's existing model portfolios and their status. Select **Create new model portfolio** to begin.



3 Enter a meaningful **Model name** and select the products you want the model portfolio to apply to.



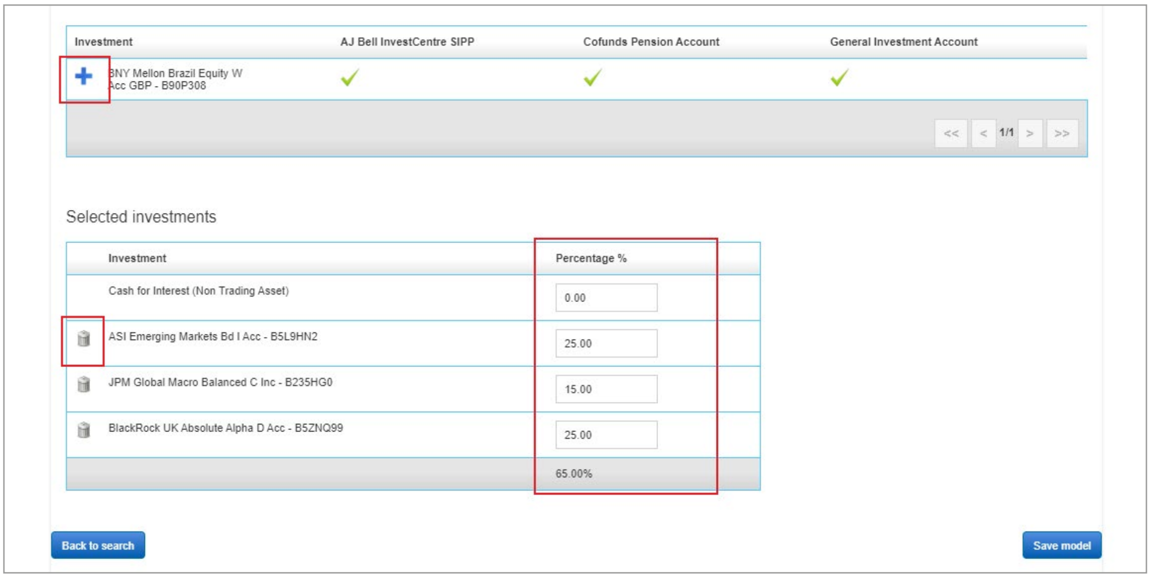
4 Use the **Investment search** tool to find the funds you want to add to the model portfolio. When you select **Search**, the list of funds based on your criteria will appear.



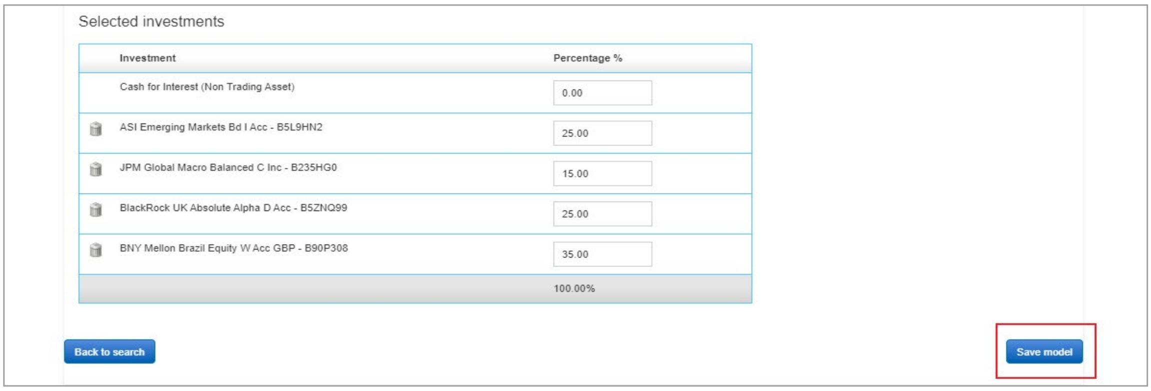
Handy hint
The ticks under each product name mean it's available for that product. If it's not available we'll show this with a red cross.

5 To add a fund, select the plus icon. This will then move under **Selected investments**. To remove a fund, select the bin icon that's next to each fund.

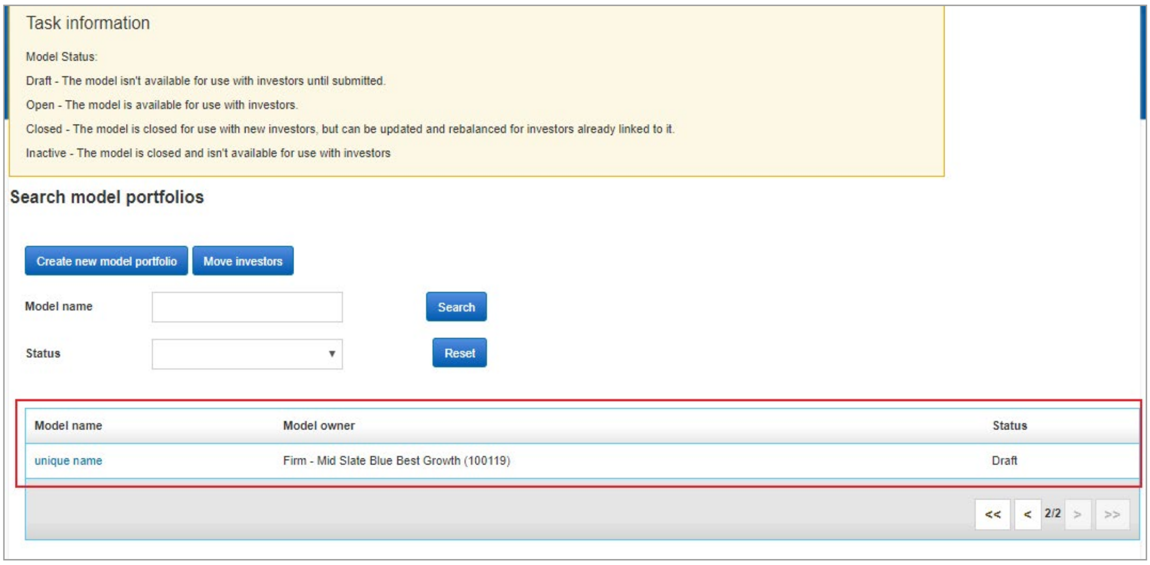
Enter the **Percentage %** you would like to invest into each fund – the total must add up to 100%.



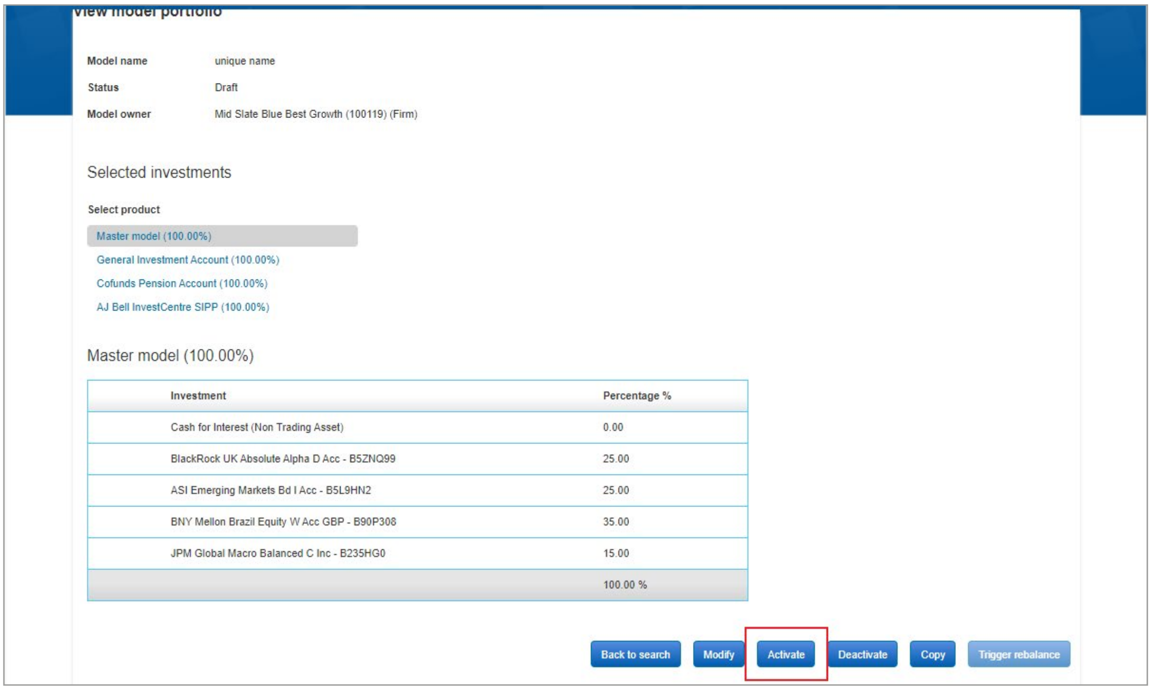
6 Select **Save model** to create a draft model portfolio.



7 You'll return to the **Search model portfolios** screen. Here you'll find the model portfolio you just created with its **Status** as **Draft**.



8 Select your model portfolio, then choose **Activate**. This will change its **Status** from **Draft** to **Open** – and the model portfolio is ready to use.


View model portfolio

Model name	unique name
Status	Draft
Model owner	Mid Slate Blue Best Growth (100119) (Firm)

Selected investments

Select product

Master model (100.00%)

General Investment Account (100.00%)

Cofunds Pension Account (100.00%)

AJ Bell InvestCentre SIPP (100.00%)

Master model (100.00%)

Investment	Percentage %
Cash for Interest (Non Trading Asset)	0.00
BlackRock UK Absolute Alpha D Acc - B5ZNQ99	25.00
ASI Emerging Markets Bd I Acc - B5L9HN2	25.00
BNY Mellon Brazil Equity W Acc GBP - B90P308	35.00
JPM Global Macro Balanced C Inc - B235HG0	15.00
	100.00 %

Back to search | Modify | Activate | Deactivate | Copy | Trigger rebalance

If you require any further support please visit aegon.co.uk/support