

Account Level Trading Screen - All Models are now Selected by Default

As a user with access to the Account Level Trading screen, all models are now selected by default to minimize your clicks to complete trading.

- Account level trading tab - *cross model processing option* - all eligible models are selected (the check box is checked) when you enter the screen and non-eligible models are not selected
- Account level trading tab - *model processing option* - all eligible models are selected (the checkbox is checked) when you enter the screen and non-eligible models are not selected
Eligible means those that could be selected manually prior to this change
Non-eligible means those that could not select manually prior to this change
- You can deselect models as needed
- The selected models are reflected in the action dock as they are when manually selected



Overview#
Net Assets
\$19,193

Holdings
Cash 93%
Securities 7%

Trading
Trade from positions or models

Performance
View performance and income

Transactions
View transactions, actions and transfers

About your account
Account Information, Documents & Settings

Buy Positions | Sell Positions | Cross Model Process | **Model Process** | Intermodel Transfer | Tax Harvest

Select Allocation Method 

VIEW BY QUANTITY VIEW BY VALUE

Model	Symbol	Quantity	Price†	Goal %	Actual %	
▼ 1-DOME-DOMESTIC GROWTH	--	--	--	33.00%	52.25%	<input checked="" type="checkbox"/>
CASH	CASH	9,883.8700	\$0.00	0.00%	98.56%	<input checked="" type="checkbox"/>
GOLDMAN SACHS HIGH YIELD FUND INST CLASS	GSHIX	21.8170	\$6.64	10.00%	1.44%	<input checked="" type="checkbox"/>
▼ 37-DOME-DOMESTIC INCOME INVESTMENTS STRATEGY	--	--	--	67.00%	47.75%	<input checked="" type="checkbox"/>
CASH	CASH	8,030.0300	\$0.00	0.00%	87.62%	<input checked="" type="checkbox"/>
FIRST EAGLE GLOBAL FUND CLASS I	SGIIX	17.5950	\$59.23	15.00%	11.37%	<input checked="" type="checkbox"/>
IRONCLAD MANAGED RISK FUND	IRONX	8.2060	\$11.20	5.00%	1.00%	<input checked="" type="checkbox"/>



Overview#
Net Assets
\$19,193

Holdings
Cash 93%
Securities 7%

Trading
Trade from positions or models

Performance
View performance and income

Transactions
View transactions, actions and transfers

About your account
Account Information, Documents & Settings

Buy Positions | Sell Positions | **Cross Model Process** | Model Process | Intermodel Transfer | Tax Harvest

VIEW BY QUANTITY VIEW BY VALUE

Model	Symbol	Quantity	Price†	Goal %	Actual %	
▼ 1-DOME-DOMESTIC GROWTH	--	--	--	33.00%	52.25%	<input checked="" type="checkbox"/>
CASH	CASH	9,883.8700	\$0.00	0.00%	98.56%	<input checked="" type="checkbox"/>
GOLDMAN SACHS HIGH YIELD FUND INST CLASS	GSHIX	21.8170	\$6.64	10.00%	1.44%	<input checked="" type="checkbox"/>
▼ 37-DOME-DOMESTIC INCOME INVESTMENTS STRATEGY	--	--	--	67.00%	47.75%	<input checked="" type="checkbox"/>
CASH	CASH	8,030.0300	\$0.00	0.00%	87.62%	<input checked="" type="checkbox"/>
FIRST EAGLE GLOBAL FUND CLASS I	SGIIX	17.5950	\$59.23	15.00%	11.37%	<input checked="" type="checkbox"/>
IRONCLAD MANAGED RISK FUND	IRONX	8.2060	\$11.20	5.00%	1.00%	<input checked="" type="checkbox"/>

NOTE: Selecting the 'Reset' button at the bottom right of screen clears all the checked boxes and deselects ALL models.

Please let your relationship manager know if you have questions and would like a feature demonstration.