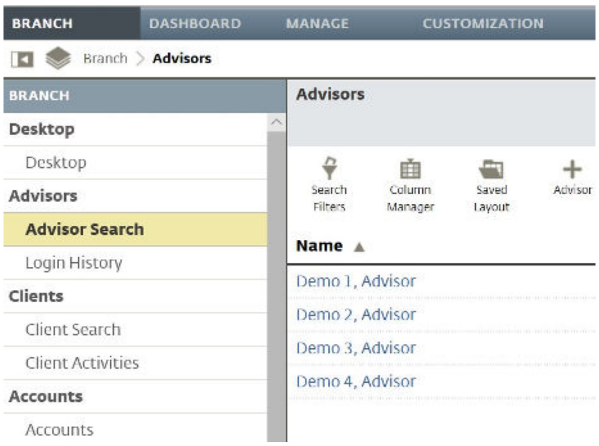
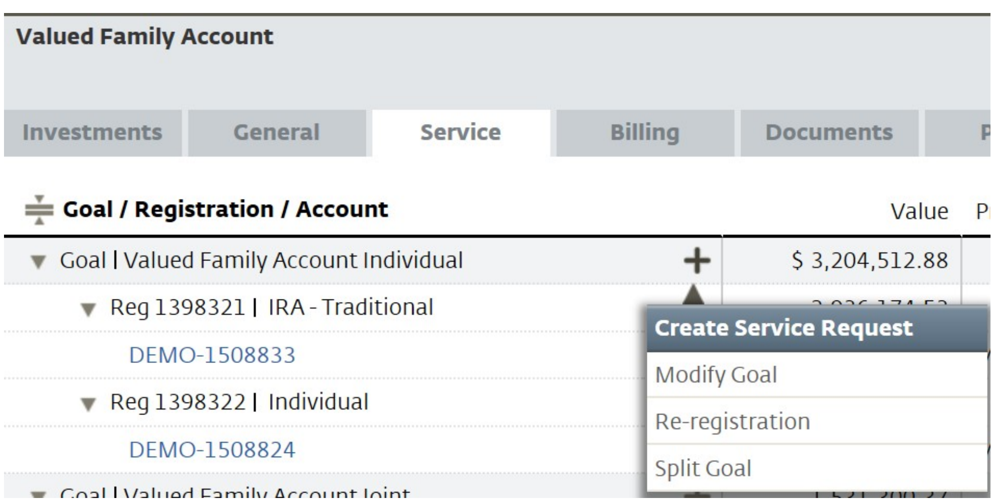
MODIFY GOAL

1. Launch into the Advisor’s Portal via Advisor Search
   - You will see the Advisor’s Name in the top right-hand corner if you have done this correctly.



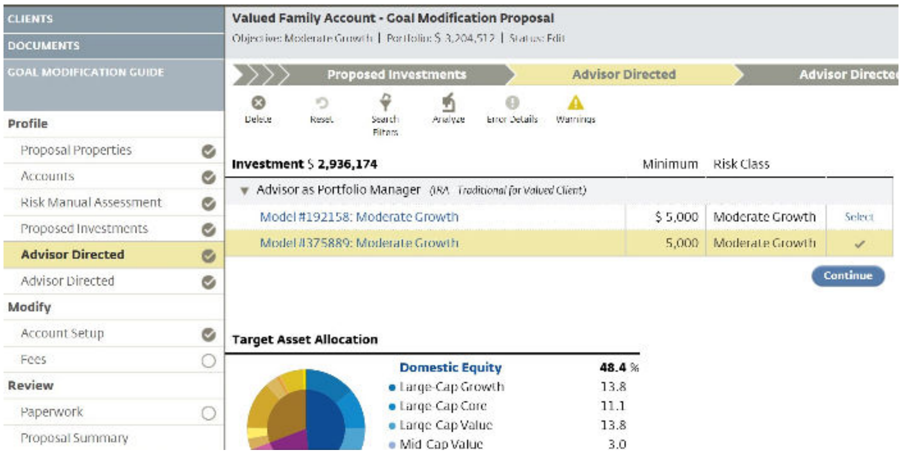
2. Search for the account that is Changing Programs via quick search or Client Tab

3. Navigate to the **Service Tab**
   - Click the **“+”** icon at the goal level
   - Select **Modify Goal**

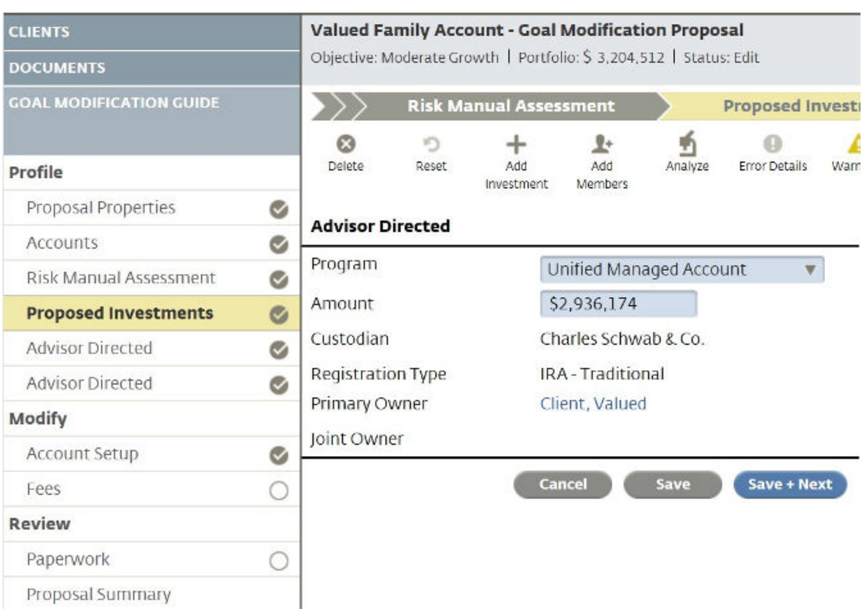


MODIFY GOAL

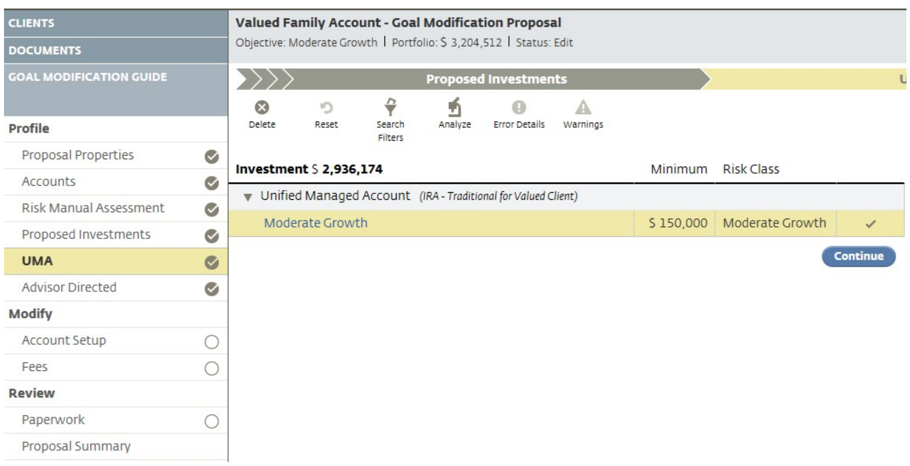
4. The Goal Modification Guide: ***APM to UMA, SMA, FSP***
   - Click on the **Proposed Investments** workspace



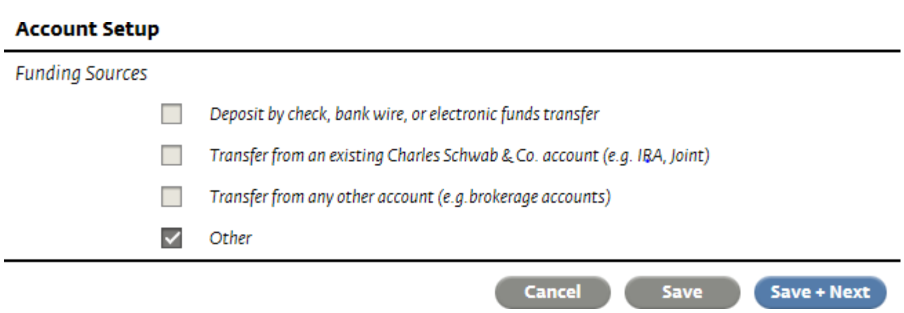
5. Proposed Investments:
   - Click **Edit**
   - Select the NEW Program (Existing UMA in this example)
     - Unified Managed Account – if you are choosing an existing UMA Model
     - Build Unified Managed Account – if you are building a Custom UMA
     - Advisor as Portfolio Manager – if you are choosing an existing APM Model
     - Build Advisor as Portfolio Manager – if you are building a Custom APM
     - Separate Accounts – choose if you are just using SMA's
     - FSP Programs – if you are choosing an FSP
     - LibertyFi PMC Foundation – PMC's Foundation Portfolio's
   - Click **Save + Next**



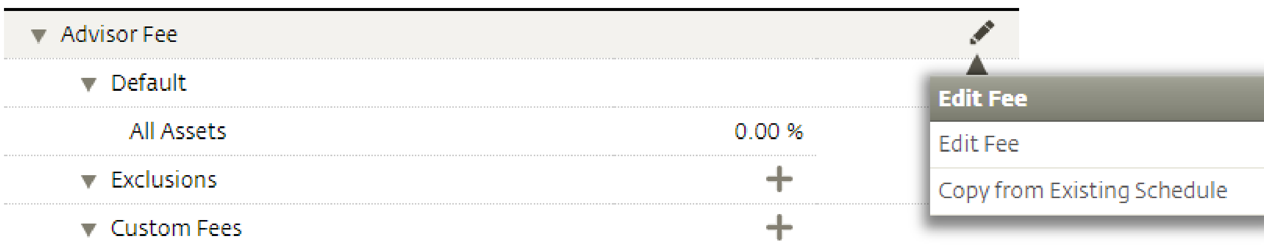
6. <u>UMA, SMA, FSP, or APM:</u>
   - Existing UMA model - click **Select** by the appropriate UMA model
   - New Custom UMA – search for the appropriate Sleeve's. Can have APM, SMA, & FSP sleeves in the same account.
   - SMA: search for the appropriate manager(s).
   - FSP: click Select by the appropriate FSP model
   - Advisor Directed: select the appropriate APM model
   - Click **Continue**



7. <u>Account Setup</u>: Select a Funding Source
   - Click **Save + Next**



8. Fees:
   - Review the Fee schedule, click the **"Pencil"** icon to edit if necessary. You now have the option to **Copy from Existing Schedule** to input the advisor fee currently listed on client account.
   - Check **Accept**
   - Click **Save + Next**



9. Paperwork Generation and Upload:
   - Click **Generate** and download the **Statement of Investment Selection**
   - After necessary signatures have been obtained, you will **Upload SIS Document** on the **Paperwork Upload** tab
   - Once SIS has been uploaded, you will **Submit** the request for processing.