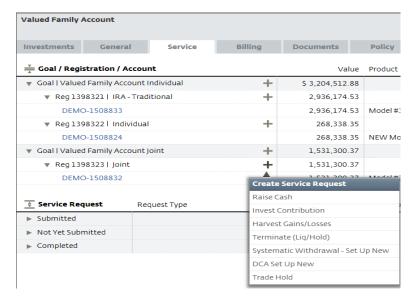


1. Search for the account via quick search or Client Tab

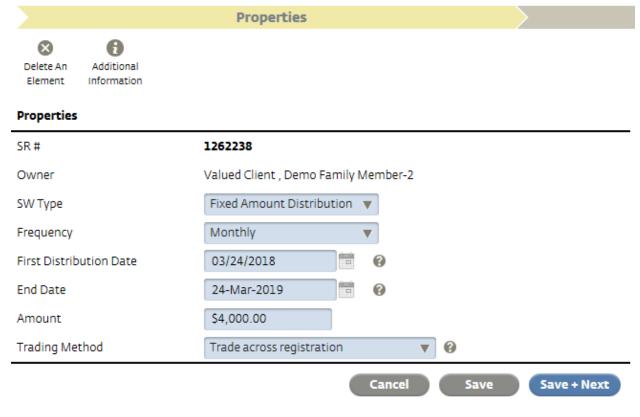


- 2. Navigate to the Service Tab
  - Click the "+" icon next to the registration from which you are raising cash
  - Select Systematic Withdrawal Set Up New



- 3. <u>Properties</u>: Enter the SW Type, Frequency, First Distribution Date, End Date, Amount, and Trading Method.
  - Systematic Withdrawal Tips:
    - o If the account already has enough cash to cover the distribution, the system will not place the trades.
    - o For annual distributions, go ahead and set up the SW, then do a Modify Systematic Withdrawal once you know the upcoming years RMD amount.
    - o First Distribution Date Choose the exact date that is set up at the custodian level.
  - Click Save + Next





## • Trading Method:

- Trade Across Registration (recommended) Based on the registration's goal (target allocation), the system will raise cash to bring accounts closer to target
- Add a Note (if necessary) to the Service Request via Manage Service Request dropdown
- Click Submit Request





- Trade Exact Amounts per Accounts Based on the registration's goal (target allocation), the system will suggest trades. You may over ride the suggested amounts if there are multiple investments. Enter the specific dollar amounts to be invested in each product by filling in the Trade Value boxes via the Edit option. If you do not have discretion to update the trade values, then continue below.
- Add a Note (if necessary) to the Service Request via Manage Service Request dropdown
- Click Continue, then Submit Request

