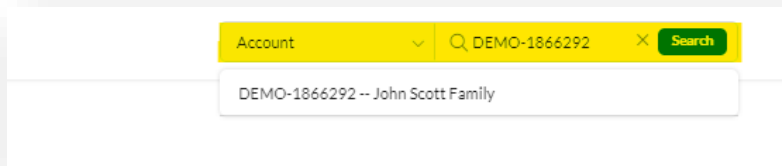


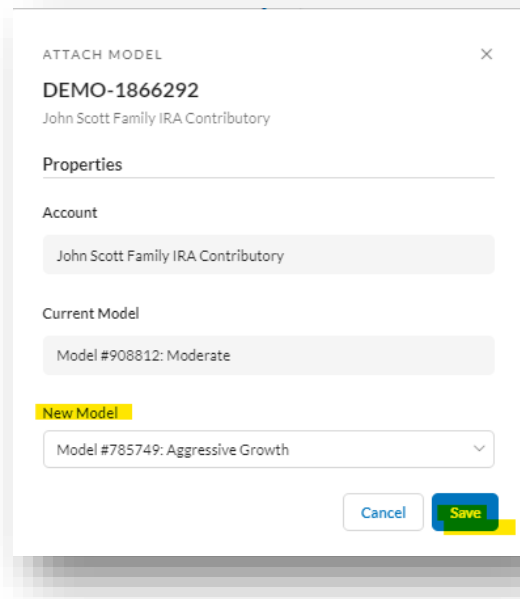
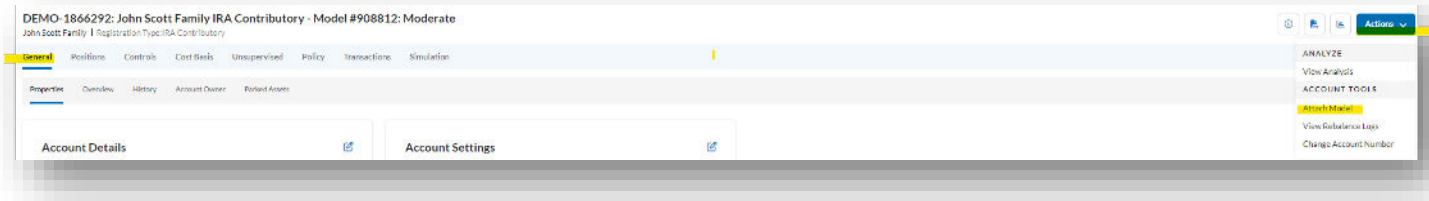
## Model Change UMA to UMA & APM to APM

When updating a model attached to UMA or APM account, you can use the 'Attach Model' feature rather than submitting a Strategy Modification.

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



2. Navigate to the General Tab of the account and click on the Actions Tab > Attach Model
  - a. Choose the new model from the dropdown menu
  - b. Click **Save**, if another pop-up opens, click **Continue**



3. Once new model is attached, the following will occur:
  - a. For APM accounts, the firm is responsible for submitting rebalance trade operation
  - b. For UMA accounts, a Product Change SR will be generated and rebalanced by Envestnet