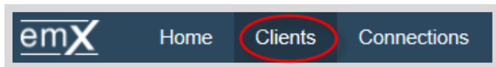
Modeling a Reinvestment Technique

This training guide will demonstrate how to model reinvestment techniques.

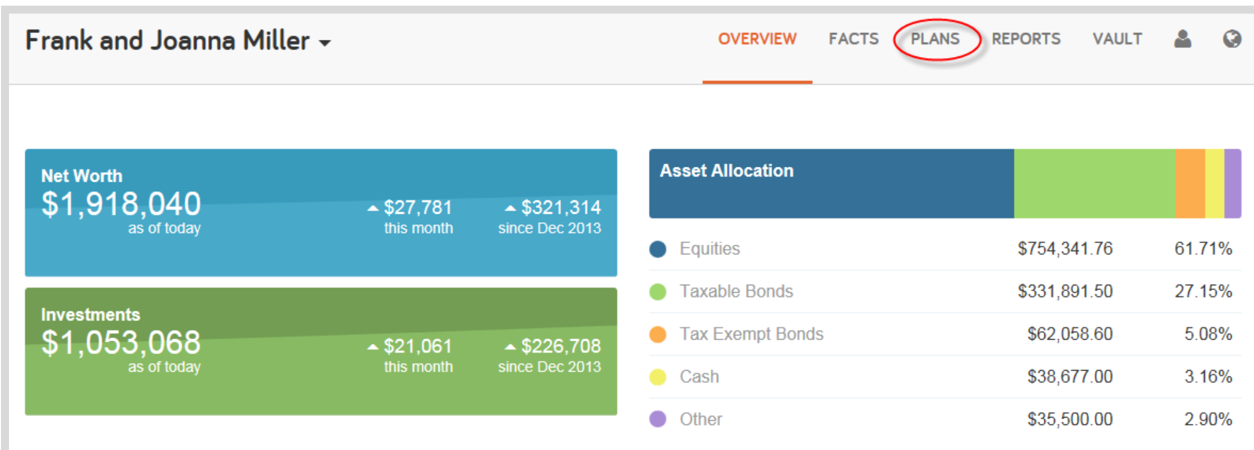
The reinvestment technique found in Advanced Plans can be used for one of two purposes:

(1) To graphically display the allocation change from current to a proposed portfolio
(2) To show the effects of this investment shift on the client's cash flow

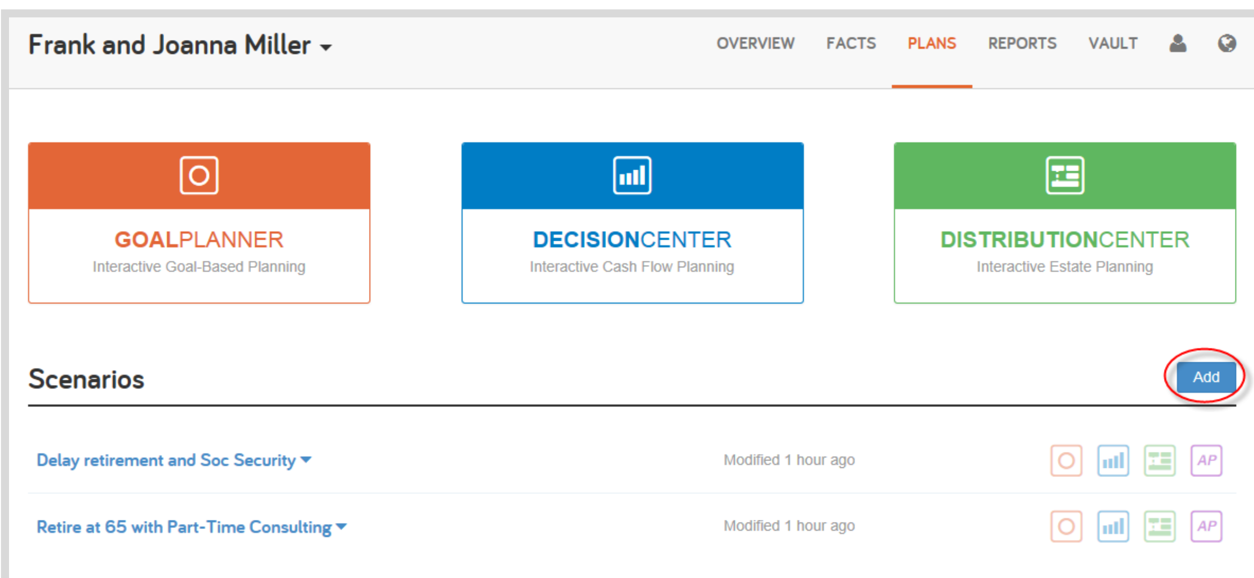
1. Click on **Clients** and choose a client.



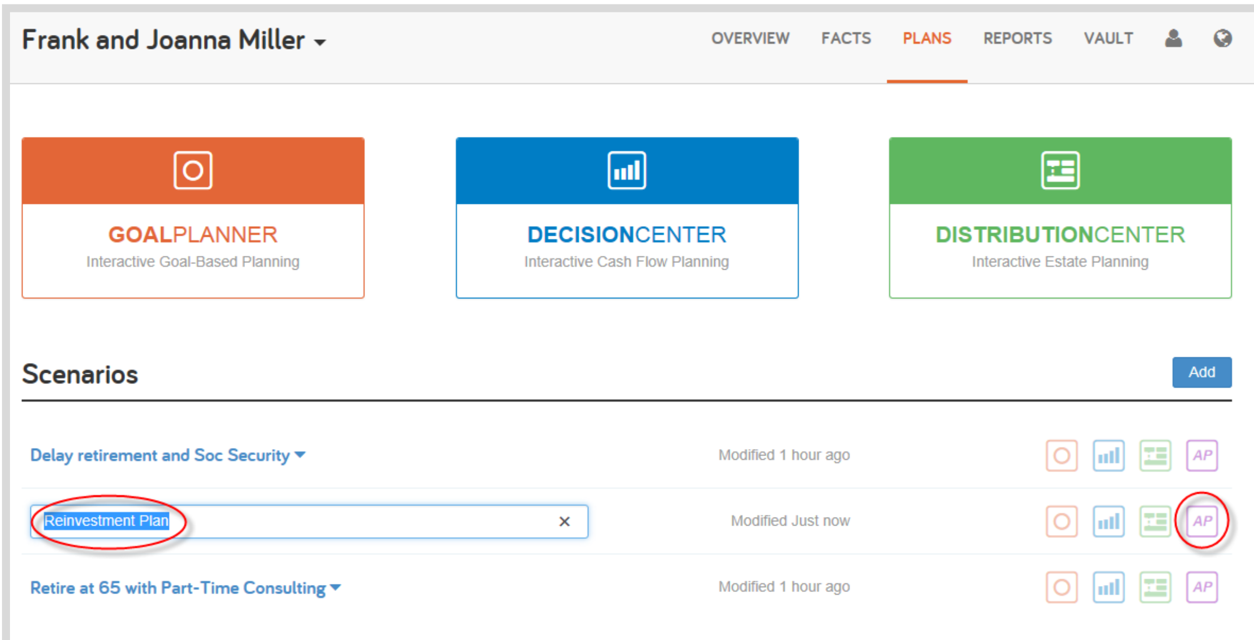
2. From the Client Overview, select **Plans**.



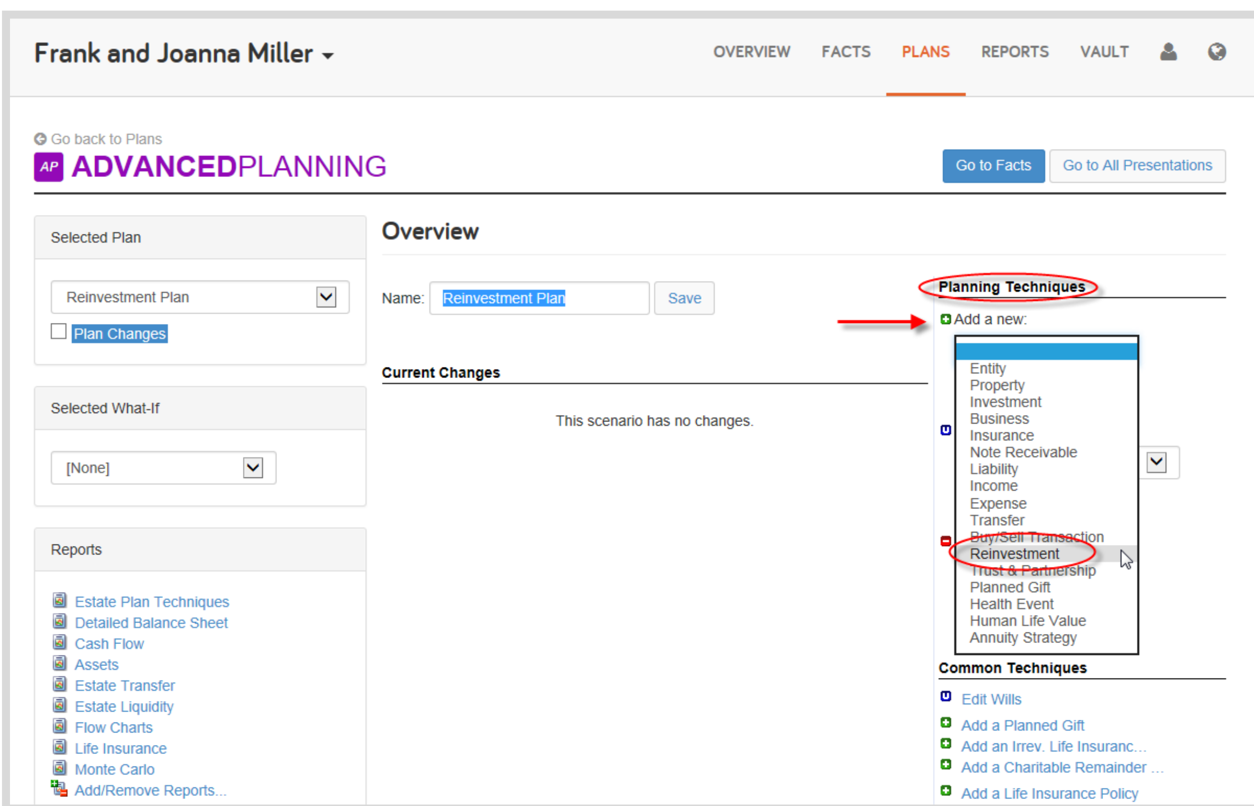
3. Click the **Add** button.



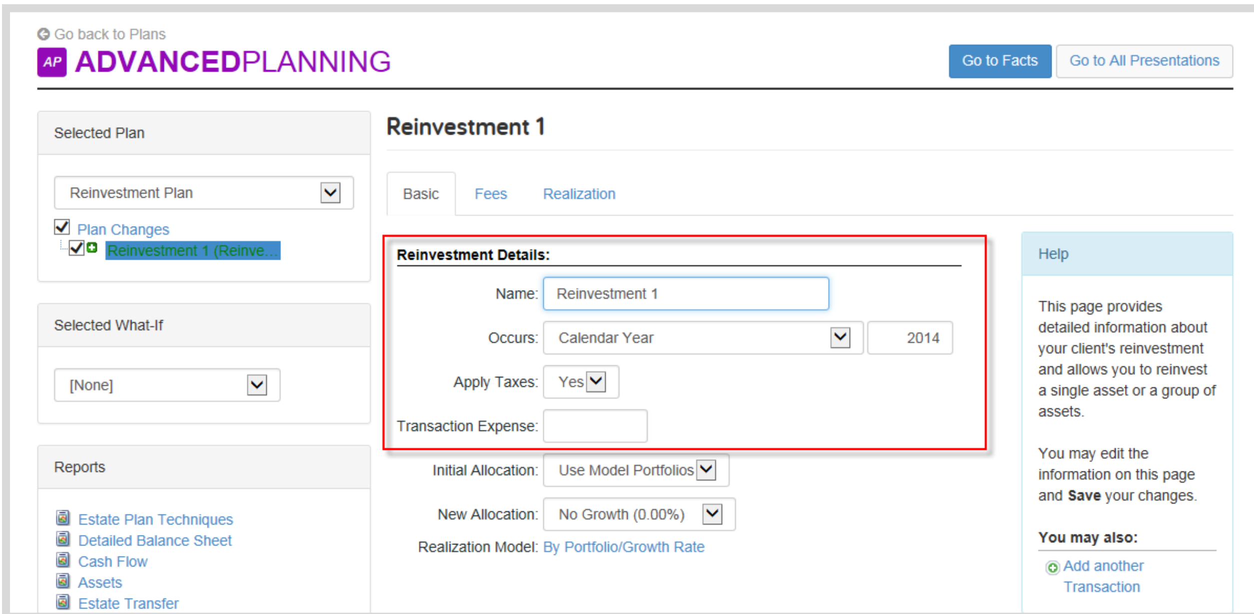
4. Name your plan and click the **Advanced Plan** button.



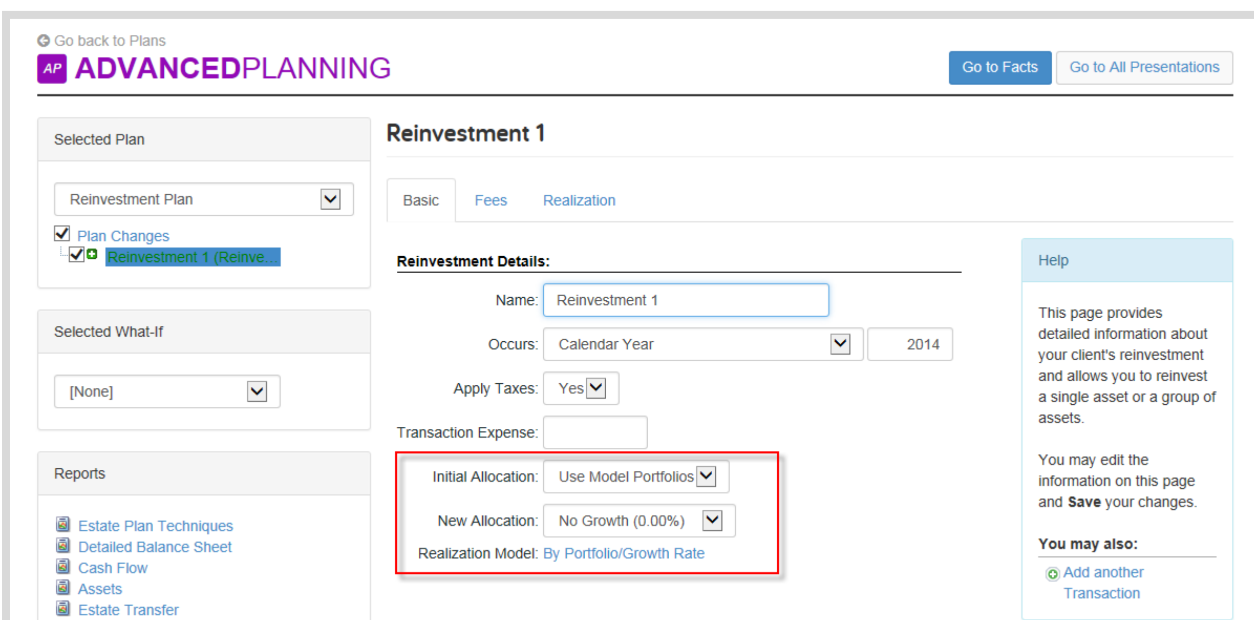
5. Add a **Reinvestment** transaction under Planning Techniques or Common Techniques on the right hand side of your screen.



6. Name the Reinvestment transaction and indicate the **Year** or **Time of Occurrence.**



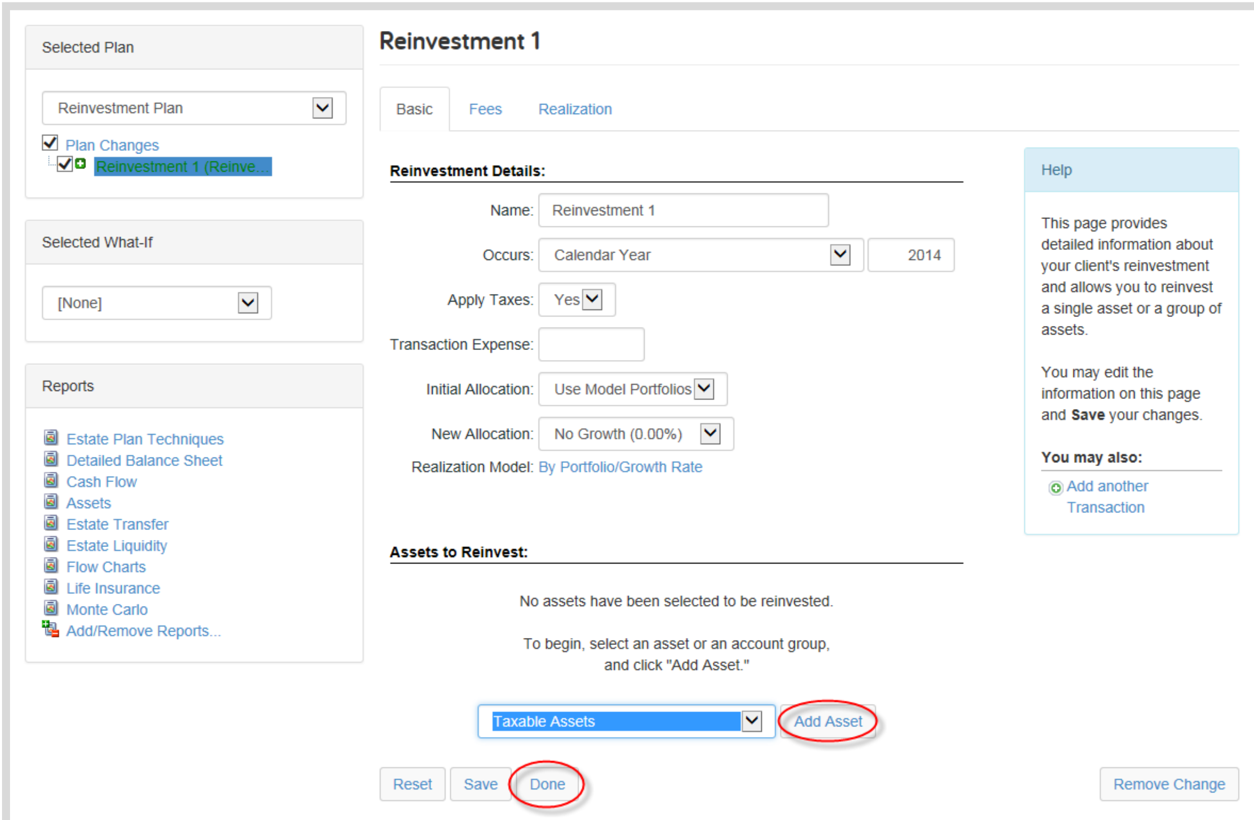
7. Indicate if taxes should be applied and any **Transaction Expenses**.



Initial Allocation: Indicate if the user wants the system to represent the current allocation by holdings or wants the current allocation to be based off of a model portfolio.

New Allocation: The new allocation may either be a preloaded model portfolio or a custom allocation that the user would have created in the assumptions section under Facts.

8. Select **Assets to Reinvest**, **Add Asset** and click **Done**.



9. Once the user has successfully added the reinvestment transaction, it will be seen in the **Plan Overview**.