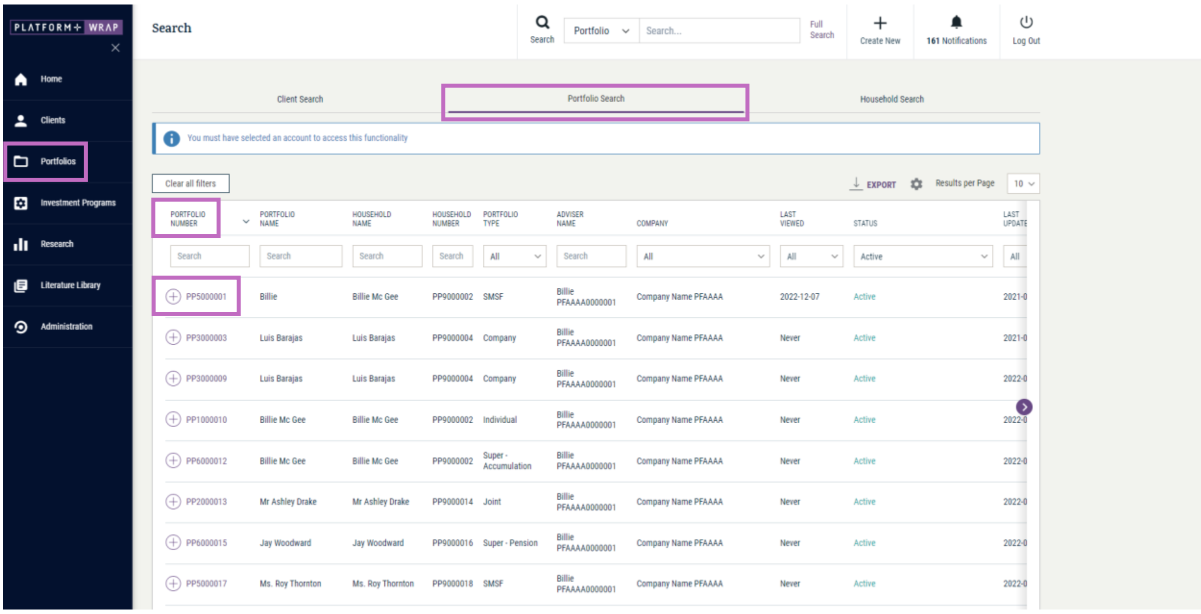
Setting up Invest Excess Cash - Active Portfolios

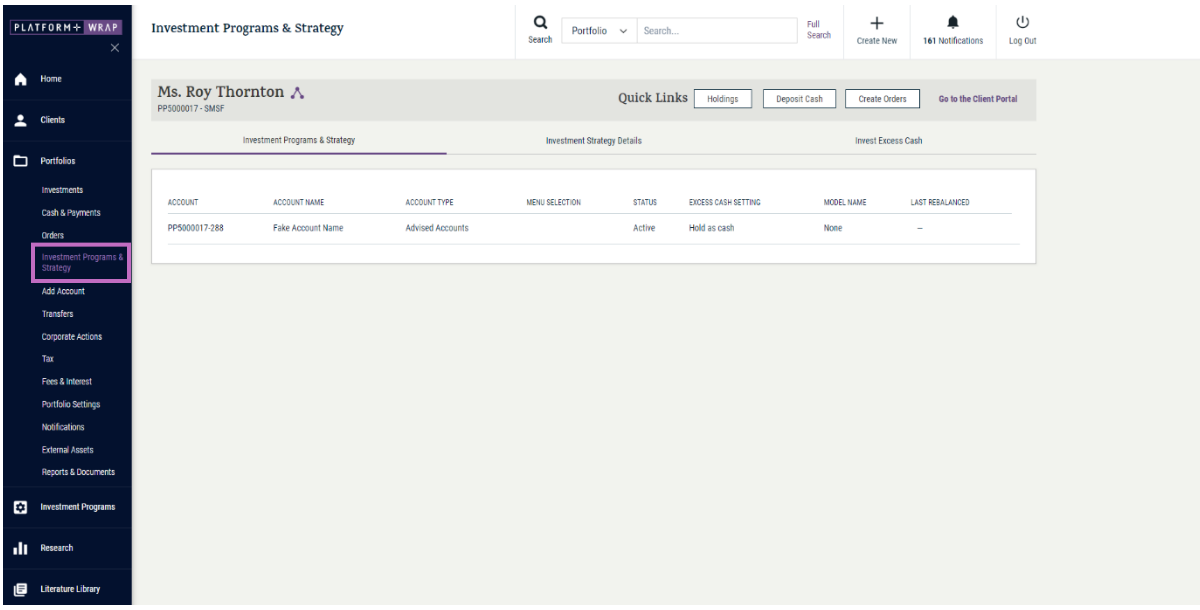
Adviser guide only.

This guide provides instructions on how to initiate automatic investment of cash on an active Portfolio.

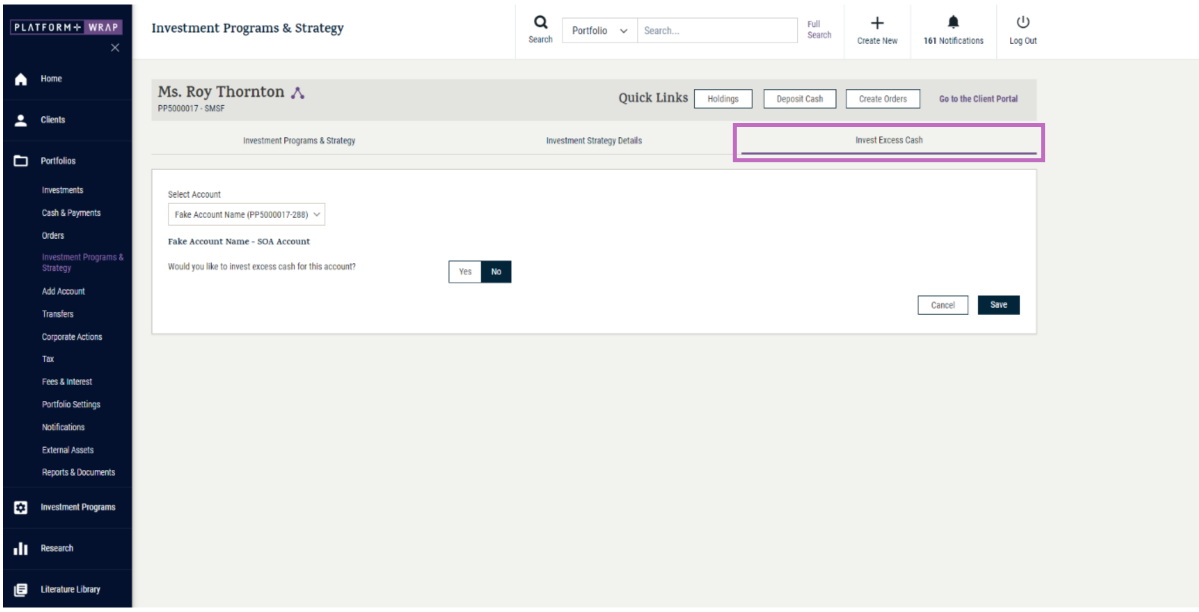
1. Click on **Portfolios** in the main menu and click on the client **Portfolio Number** under **Portfolio Search**



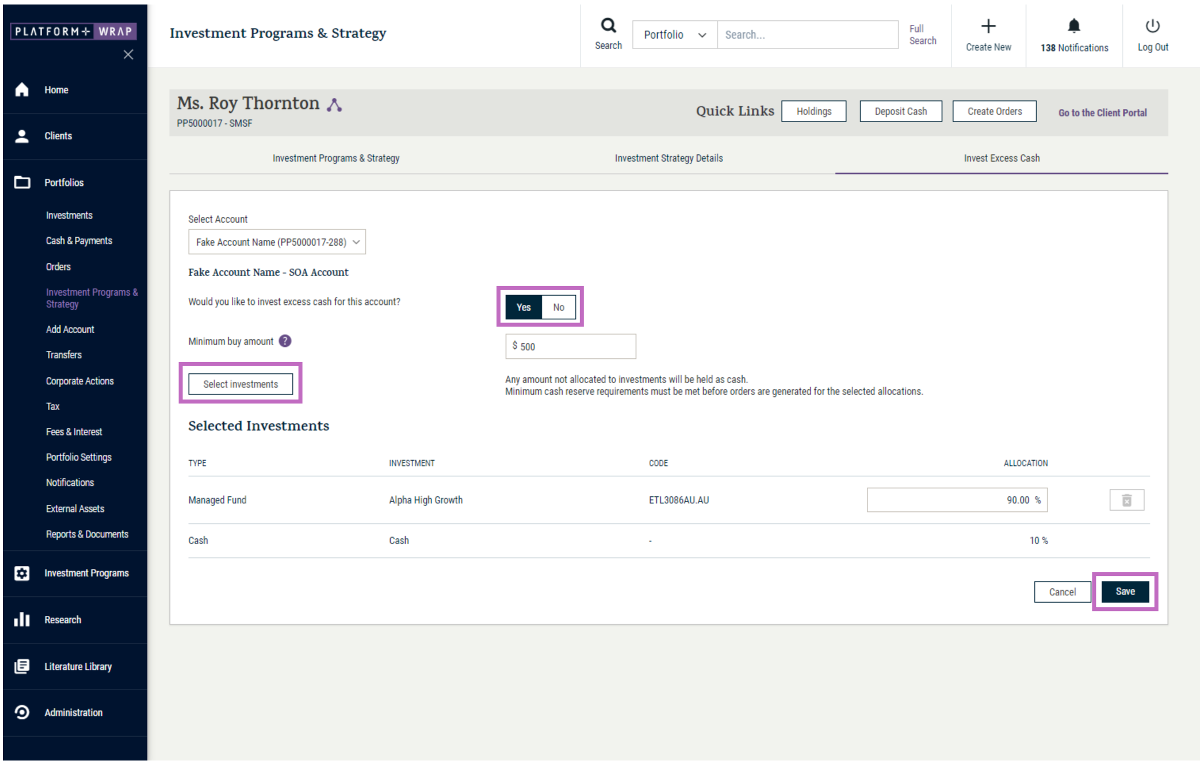
2. Click on **Investment Programs & Strategy**



3. Click on **Invest Excess Cash**



4. Move toggle to **Yes** and complete the required fields, including selecting the investment/s
5. Once completed, click **Save**



Should you have any questions or require any additional information in relation to this guide, please contact the PlatformplusWRAP Support Team on 1300 191 952 or support@platformplus.com.au.