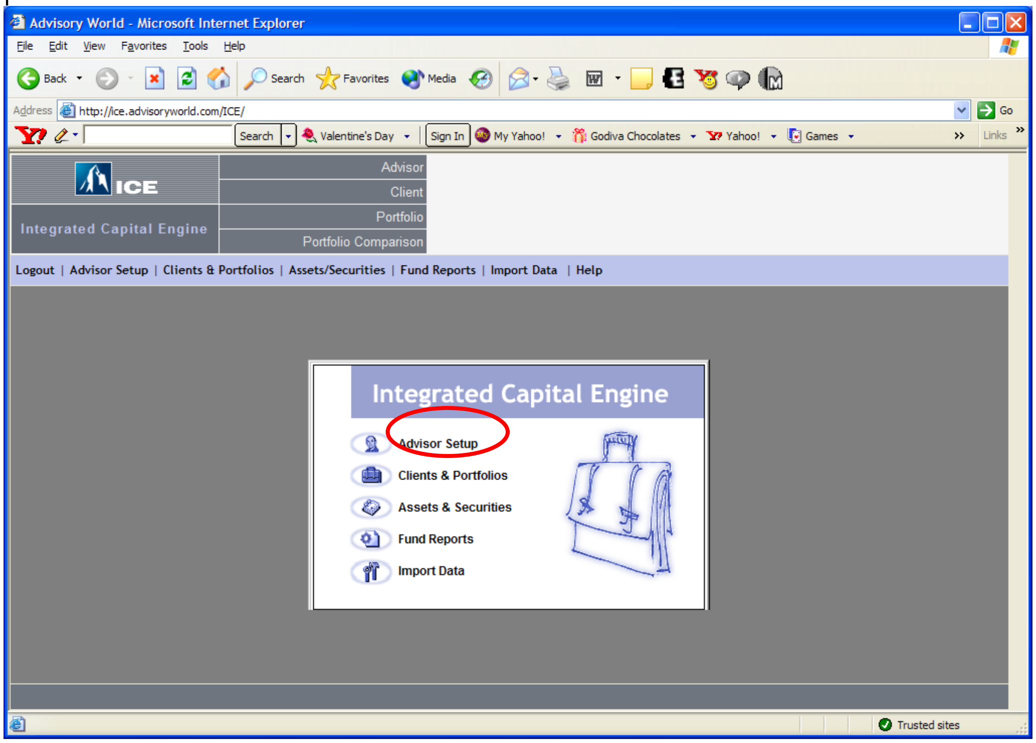
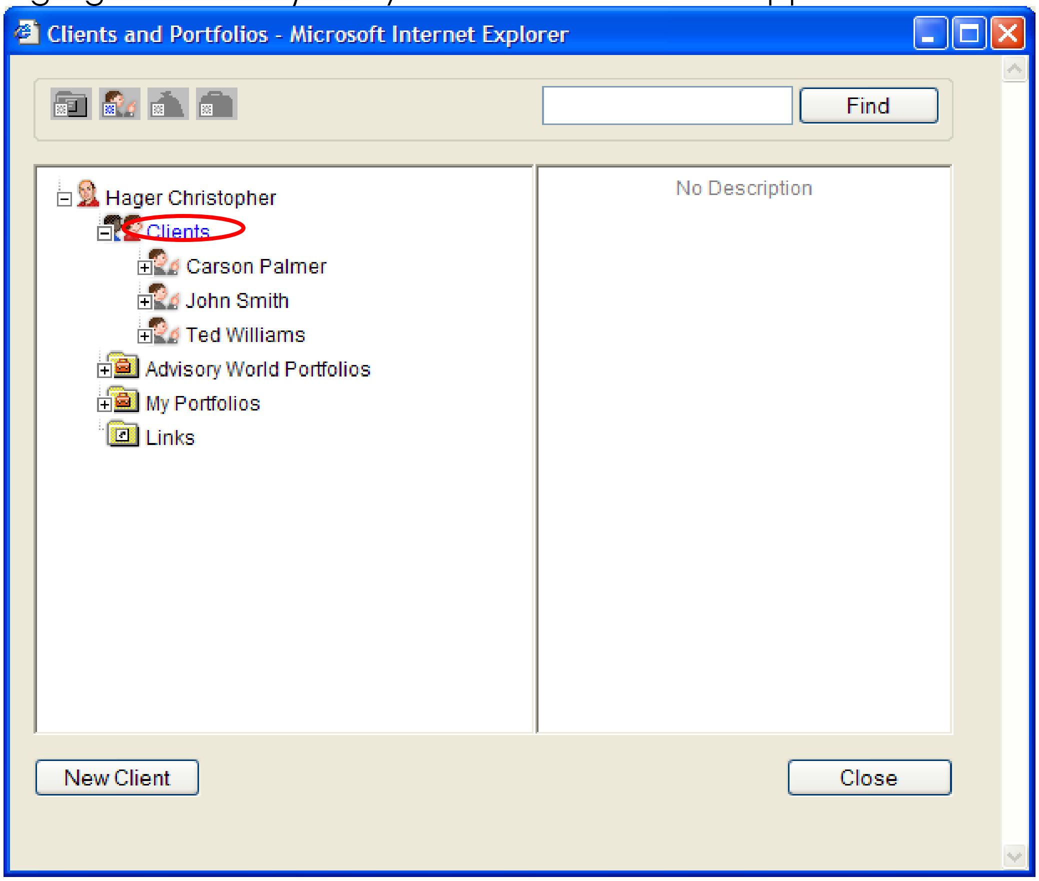
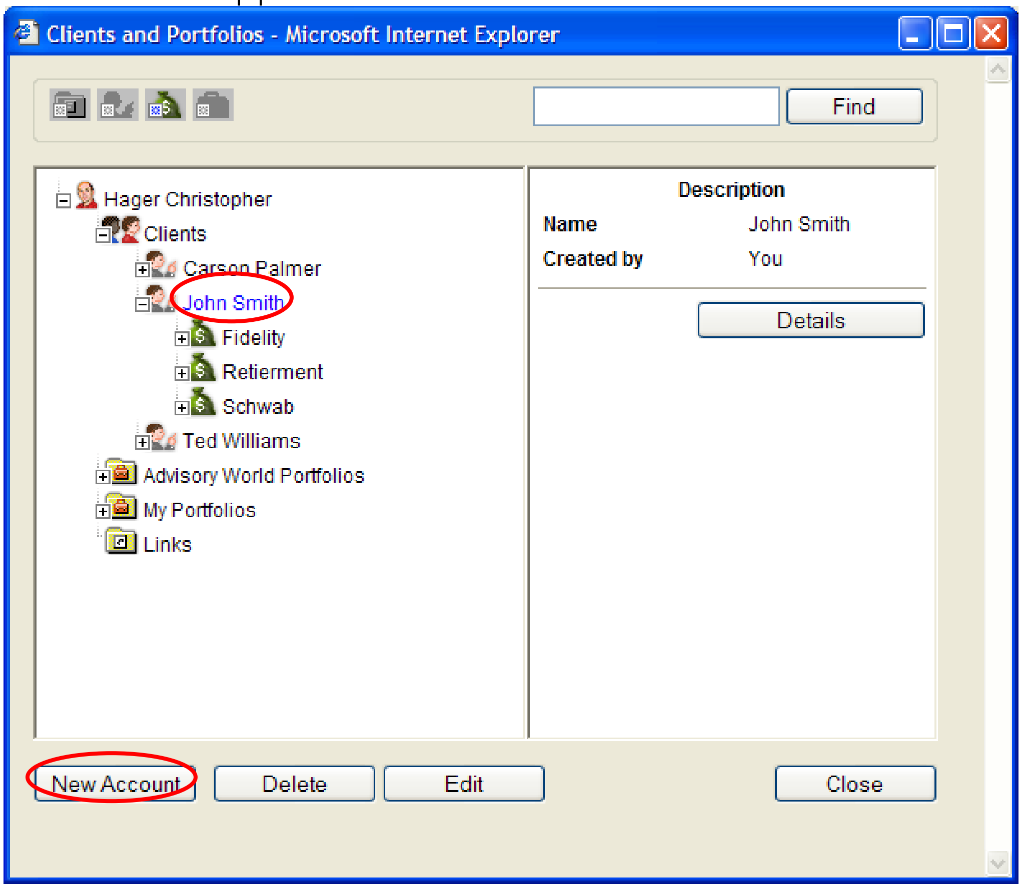
In order to combine portfolios in the ICE application, first select clients & portfolios.



Next select a Client on the Clients Folder (The word Clients should be highlighted in blue) and your clients' names will appear below.

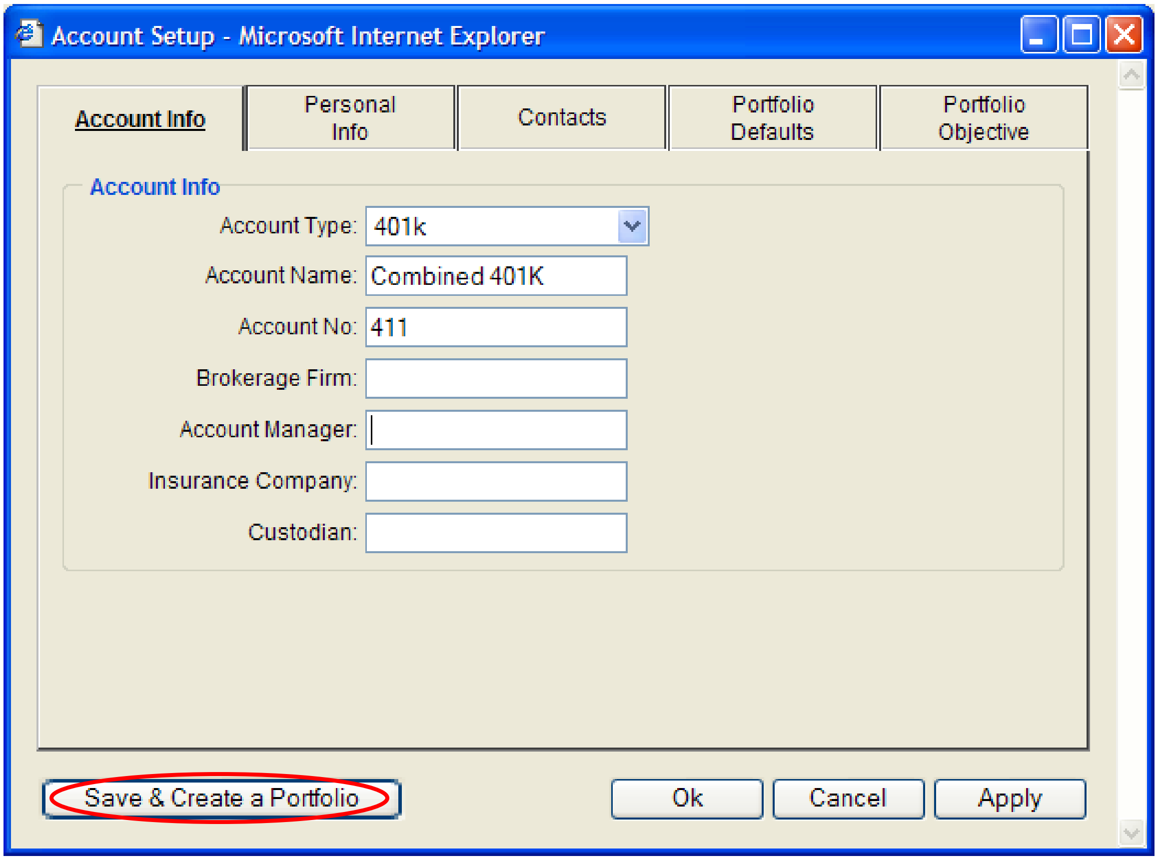


Now select the name of the client you want to work with, your client's accounts will appear below.



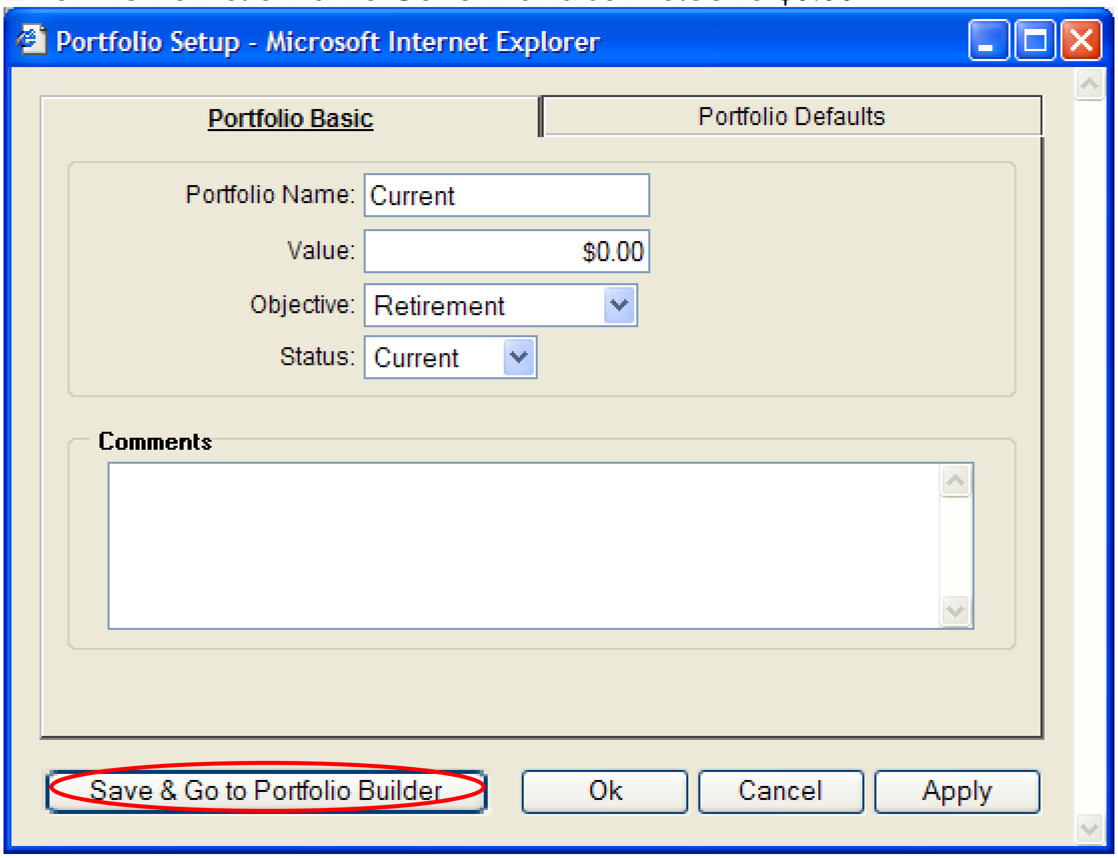
In this case we are going to combine two 401K accounts in to one. To do this click the button labeled New Account.

Since both accounts are 401K, mark that as your Account Type. Name account Combined 401K and then proceed to enter in an account number.



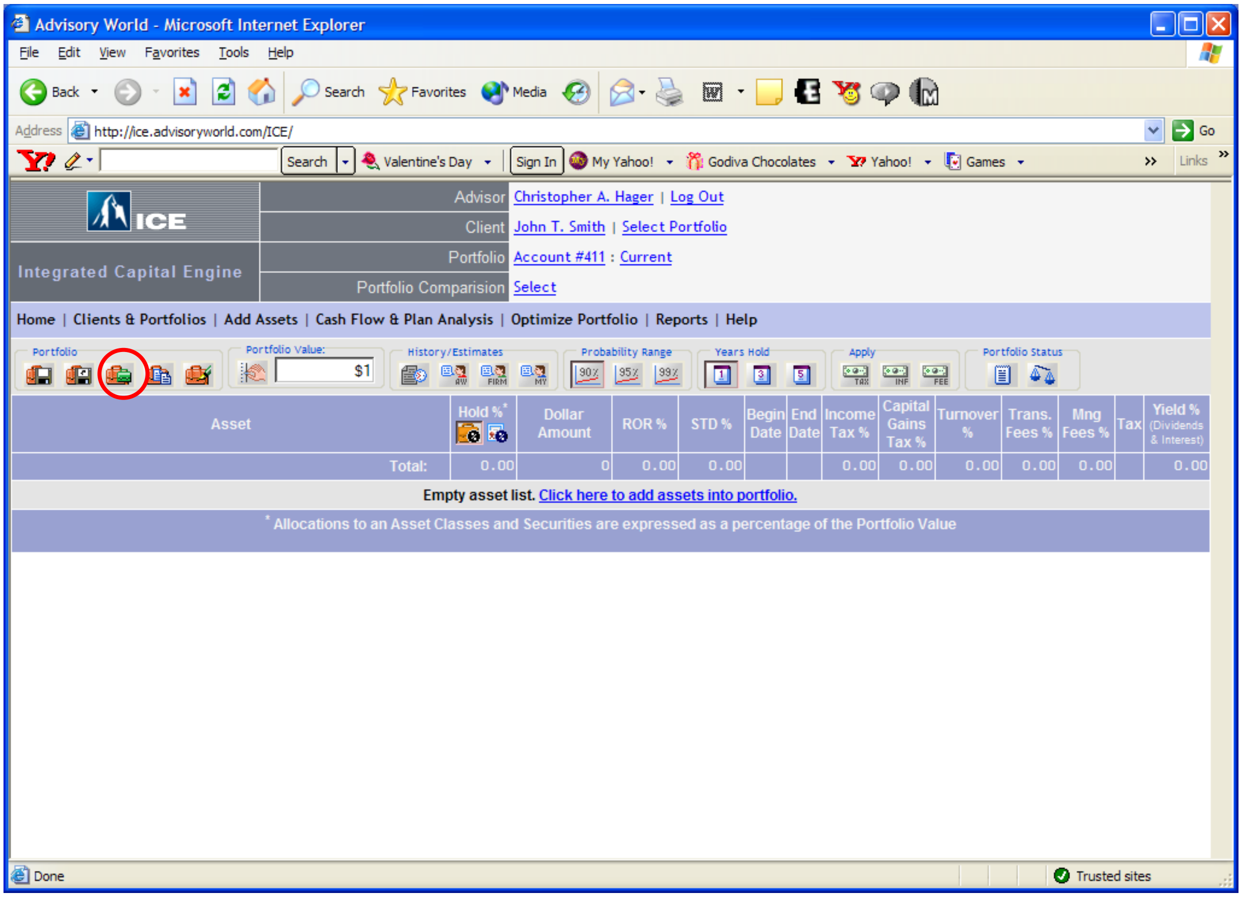
Press the Save & Create a Portfolio.

Enter the Portfolio Name Current and set value to $0.00

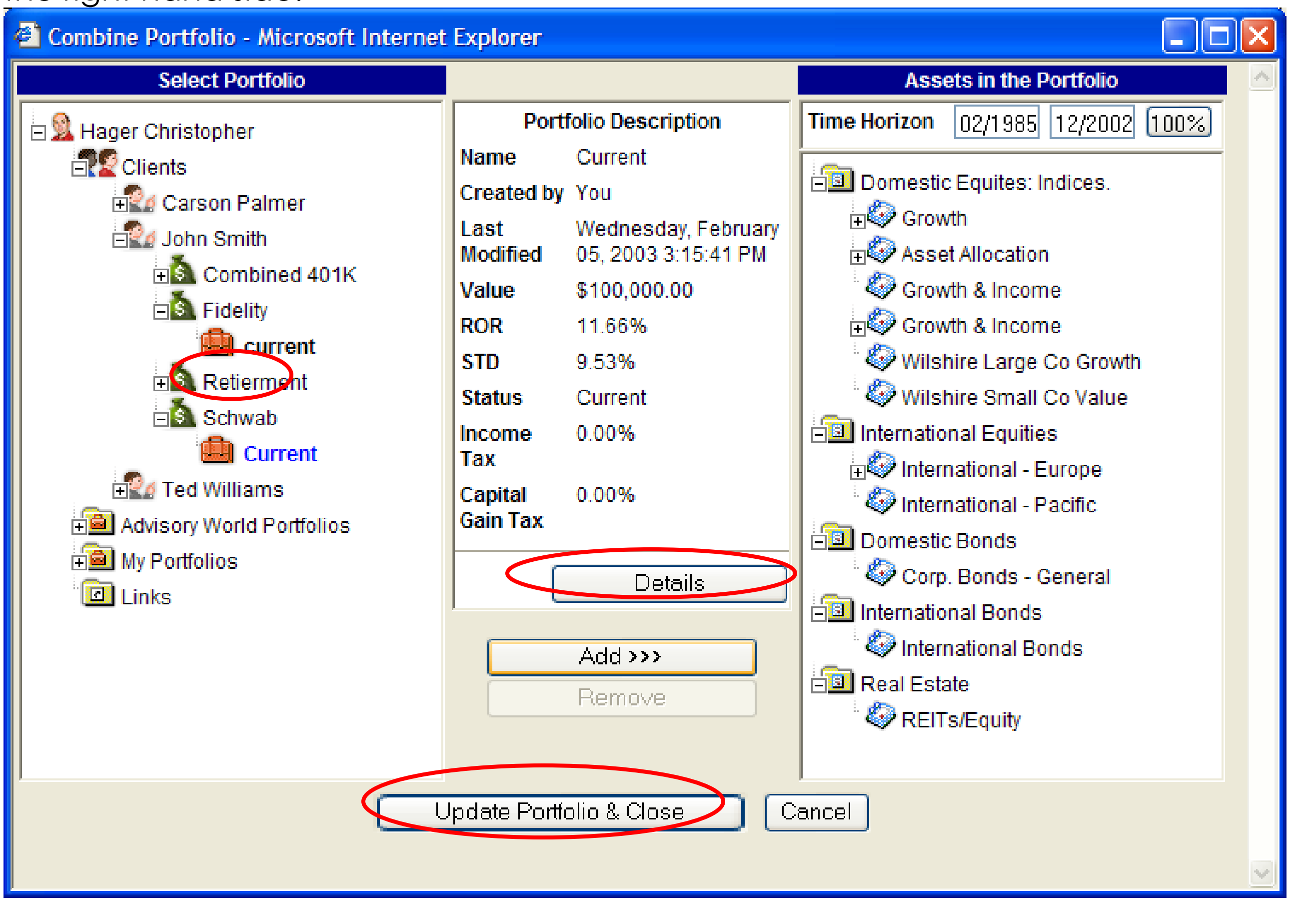


Once complete, press Save and Go to Portfolio Builder.

When the Portfolio Builder page appears you are going to click the 3rd icon from the left, the Combine Portfolios Button.

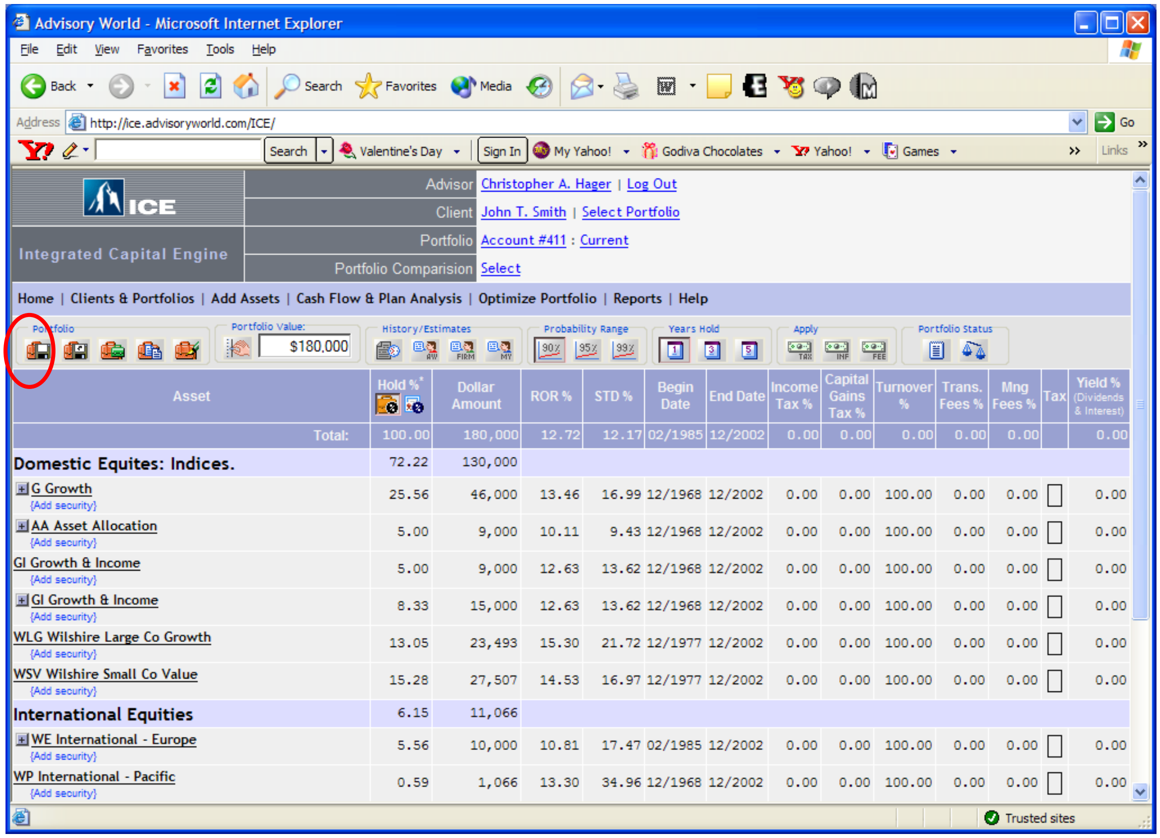


When the Combine portfolios window pops up, simply click:
+ next to Clients→ + next to Client's Name → + next to Client Account → on the Portfolio to be combined(becomes blue) → then press the Add button to move portfolio's into one location. (Portfolio must be highlighted blue in order to add) Repeat this process until all desired portfolios are on the right hand side.

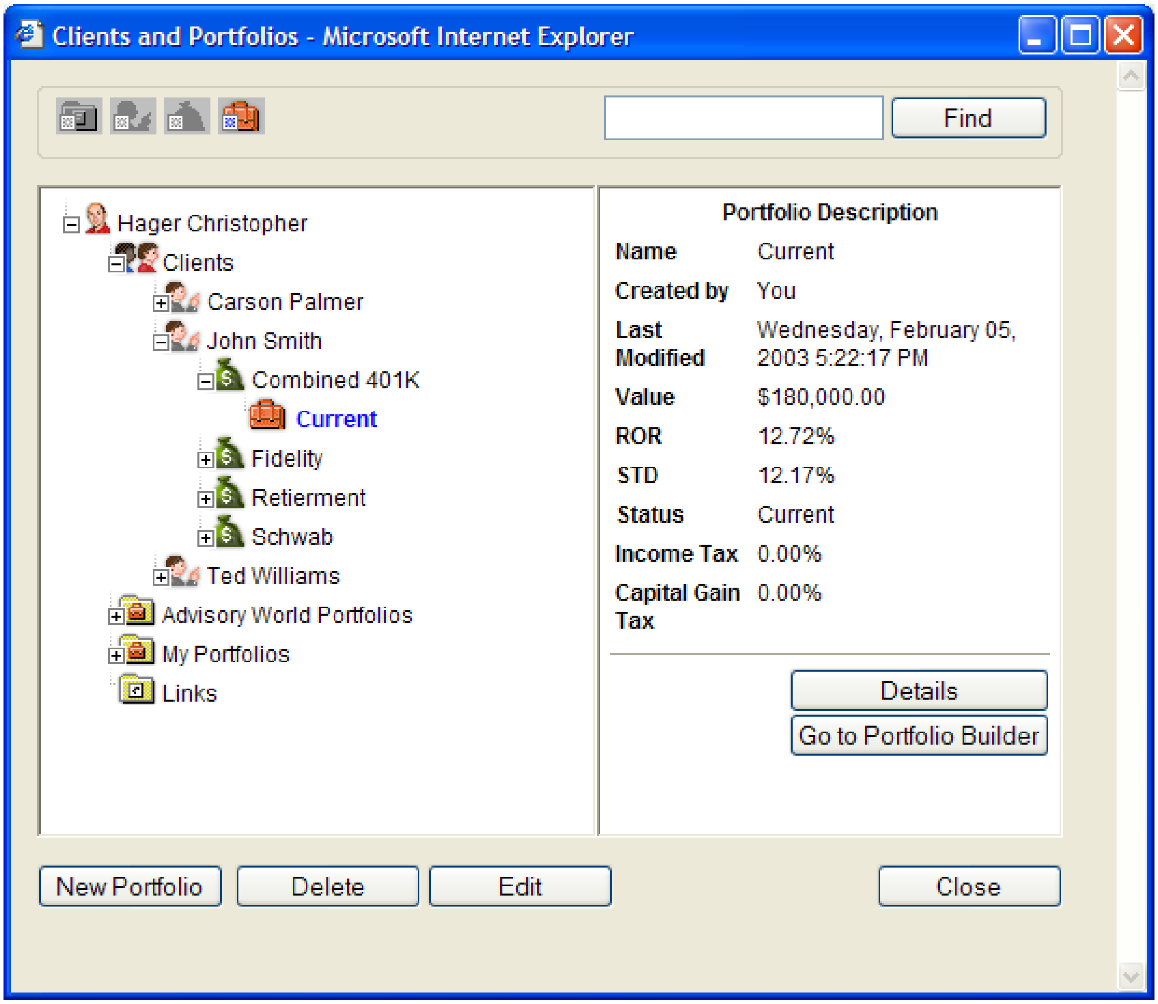


Then press Update Portfolio & Close.

Now you are looking at a combined portfolio be sure to save. By pressing the 1st icon on the left.



Your combined portfolio is now listed under your client's account.



If you have any questions regarding this or any other feature of the ICE application please feel free to contact us.

Thank you,
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