

# Can I delete a portfolio?

Last Modified on 23/04/2024 11:48 am BST

You can delete the portfolio from the Portfolio screen:

Portfolio Builder  
All

13 items • Sorted by Name • Filtered by All portfolio builder • Updated 2 minutes ago

Name	Risk Name One	Availability	Owner Alias	Last Modified Date	Record Type
Import Test 1	Balanced	Private	UUser	17/11/2021, 11:18	Model Portfolio
Model Test Portfolio	Moderately Cautious	Private	UUser	17/11/2021, 03:19	Model Portfolio
Model Test Portfolio	Moderately Adventurous	Private	UUser	17/11/2021, 09:55	Model Portfolio
Model Test Portfolio - Copy		Private	UUser	17/11/2021, 11:36	Model Portfolio
Portfolio Test 1	Adventurous	Private	UUser	17/11/2021, 11:18	Model Portfolio
Test Portfolio	Adventurous	Private	UUser	17/11/2021, 03:19	Model Portfolio
Test Portfolio 1	Moderately Adventurous	Private	UUser	17/11/2021, 03:19	Model Portfolio
Test Portfolio 2	Adventurous	Private	UUser	17/11/2021, 03:19	Model Portfolio
Test Portfolio 2	Cautious	Private	UUser	17/11/2021, 03:19	Model Portfolio
Test Portfolio 2		Private	UUser	17/11/2021, 09:44	Model Portfolio
Test Portfolio 3	Moderately Adventurous	Private	UUser	17/11/2021, 03:19	Model Portfolio
Test Portfolio 4	Adventurous	Private	UUser	17/11/2021, 03:19	Model Portfolio
Test Portfolio import 3	Moderately Adventurous	Private	UUser	17/11/2021, 11:18	Model Portfolio

Are you sure you want to delete this Portfolio?

You can also delete from within the portfolio:

Portfolio  
Amy Test Portfolio 0709

Details Portfolio Builder Compliance Portfolio Factsheet

Fund Search

Fund Table

Code	Shareclass Lock	Name	Promoter	Asset Allocation	Weighting %
BFB9	Lock	TIM AAP Adventurous C Acc	7IM Investment Funds	33.33	33.33
ACDQ	Lock	Vanguard LifeStrategy 60% Equity A Shares Acc	Vanguard Investments UK Limite	33.34	33.34
ACDQ	Lock	Vanguard LifeStrategy 40% Equity A Shares Acc	Vanguard Investments UK Limite	33.33	33.33

Portfolio Summary

Risk Profile Category: **Balanced** Risk Rating: **3.6**

Minimum Gain in any 1 Year: **-14.9% or -£1,490.00**

Average Gain in any 1 Year: **7.01% or £701.00**

Maximum Gain in any 1 Year: **27.42% or £2,742.00**

Asset class weightings for the portfolio as a percentage

- 39.31% - Global Equities (ex UK)
- 73.87% - Global Bonds (ex UK)

If you have used the portfolio against a client activity (for e.g. an Illustration) you will be presented with the following message:

This Portfolio is linked to one or more client activities

Select **Deactivate** if you want to keep the portfolio but prevent it from being used (Recommended)

OR

Select **Delete** if you want to permanently delete the portfolio, which means you will have to select an alternate portfolio the next time the client activity is reviewed

Deactivate

Cancel

Delete

It is best to deactivate, as this will prevent the portfolio being used but will allow the portfolio to stay linked to client activities.

If you choose to delete the portfolio, you will be prompted to select an alternative portfolio next time the client activity is reviewed.

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