



# Assigning Account Benchmarks.

When looking at the Client view within Advanced Client Reporting, follow these steps to assign or change a benchmark at the account level.

1) Select an account, then 2) Select Edit

Assets		
Accounts		
Analisa Demos	409490	894,850
Fermin Demos	477268	28,881
Kathey Demos	629192	395,303
Kayleen Demos	629193	0
<b>1 Venessa Demos</b>	853462	26,340
Zana Demos	1549032	850
<b>Total Assets</b>		<b>\$ 1,346,224</b>

**Account Details** 2

Custodian Account

853462

Custodian

SEI

- 3) Select the Primary Benchmark field
- 4) Enter text or select from the drop down fields
- 5) Select Search to see the list of results
- 6) Select the desired benchmark
- 7) Select Save

SEI American Funds U.S. Focused Growth & Income

SEI American Funds U.S. Focused Moderate Growth & Income

**6 SEI Domestic Capital Growth**

SEI Domestic Conservative Growth & Income

SEI Domestic Current Income

SEI Domestic Equity

SEI Domestic ETF Capital Growth

SEI Domestic ETF Conservative Growth & Income

SEI Domestic ETF Equity

**3** Primary Benchmark

use default

**4**  **5**

All

Primary Benchmark

SEI Domestic Capital Growth

Hide Non-primary Benchmarks in Reports

Custodian Rep Code

**7**

The selected account benchmark will now appear on your performance reports.