## Assigning Client Benchmarks.



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

1) Select the General tab, then 2) Select Edit

Demos 1	
Financials General Service Documents Policy	Profile Activity Settings
<ul> <li>Financials †</li> </ul>	Custodian Accour
Client Rollup	Properties 2
Rollup of All Accounts	Client Title 🛈
<ul> <li>Assets</li> </ul>	
<ul> <li>Accounts</li> </ul>	Ren Code
Analisa Demos :	409490
<ul> <li>3) Select the Primary Benchman</li> <li>4) Enter text or select from the</li> <li>5) Select Search to see the list</li> <li>5) Select the desired benchmar</li> <li>7) Select Save</li> </ul>	SEI American Funds U.S. Focused Growth & Income         SEI American Funds U.S. Focused Moderate Growth & Income         SEI American Funds U.S. Focused Moderate Growth & Income         SEI Domestic Capital Growth         SEI Domestic CTF Capital Growth         SEI Domestic ETF Conservative Growth & Income         SEI Domestic ETF Conservative Growth & Income         SEI Domestic ETF Conservative Growth & Income         SEI Domestic ETF Capital Growth         SEI Domestic ETF Capital Growth
3 Use default	Primary Benchmark
	SEI Domestic Capital Growth Q
4 Q SEI	5 * Search Hide Non-primary Benchmarks in Reports
	Custodian Rep Code
	Cancel Save

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