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Broadridge Data Aggregation Aged Accounts Worksheet

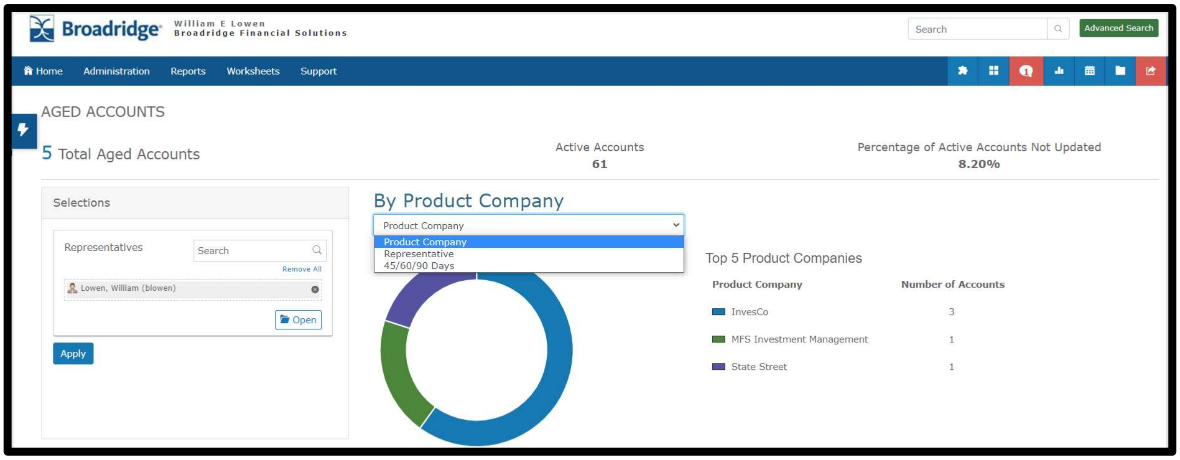
A guide for users that demonstrates how to remove investment accounts from the adviser's practice management dashboard. This guide will also demonstrate how to deactivate and remove accounts from client groups.

GENERAL INFORMATION

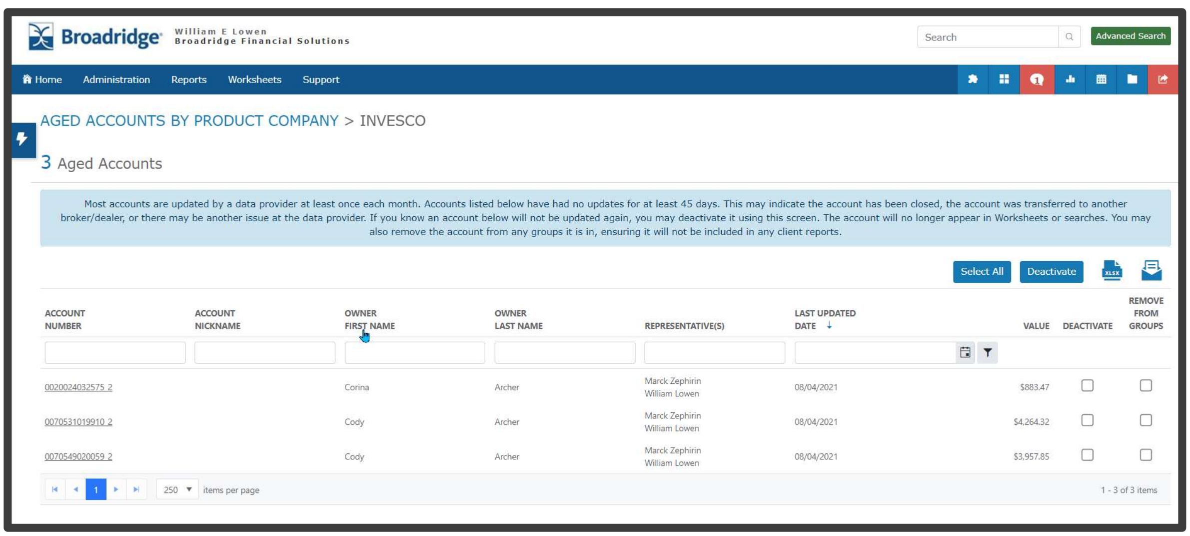
The Aged Accounts Worksheet is used to deactivate and remove closed client accounts from the Broadridge Practice Management Dashboard and client groups.

Closed investment accounts that appear on the Aged Accounts Worksheet can be identified by the Account Alerts warning located on the client account record.

Select the user profile you wish to update by using the representative search function. The drop-down menu is used to sort results by product company, representative or timeframe. Choose the field you wish to update by clicking on it from the drop-down menu.

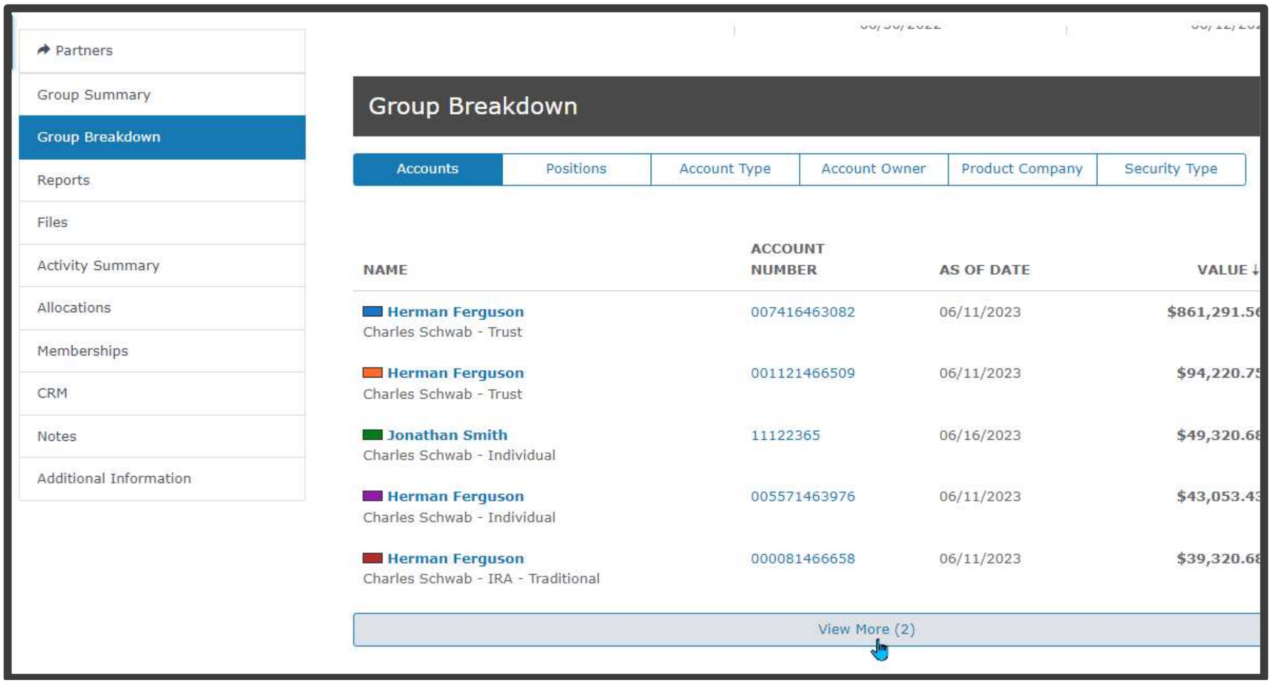


The user can deactivate the account and remove it from the group by selecting the box that corresponds with the account or they can remove all accounts by clicking **SELECT ALL**. Clicking **DEACTIVATE** will save the update.

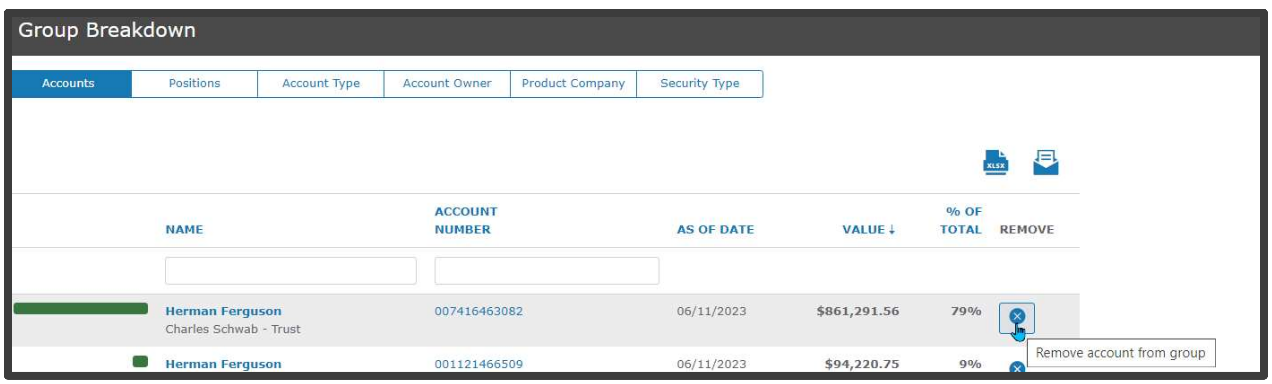


An account can also be manually deactivated by clicking the **DEACTIVATE** button located on additional information tab on the side menu of the account record.

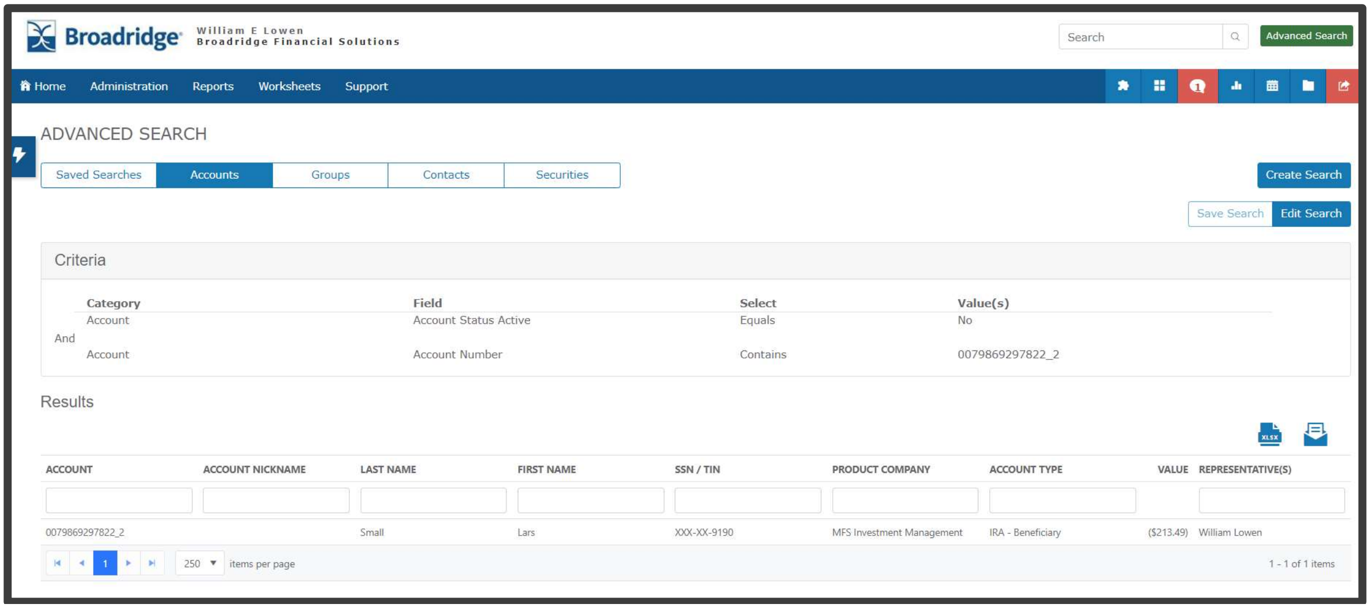
An account can be manually removed from the client group by navigating to the group record and clicking **VIEW MORE** from the group breakdown tab.



Click the **X ICON** that corresponds with the account that you wish to remove from the client group.



The Advanced Search is used to find an inactive account. Click **ADD CRITERIA** to build an inactive account search then click the account result you wish to restore.



Click **REACTIVATE** located on the Additional Information tab to restore the account.