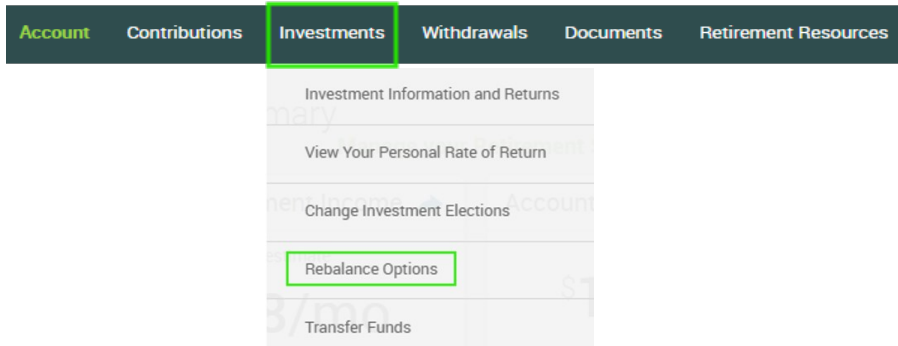




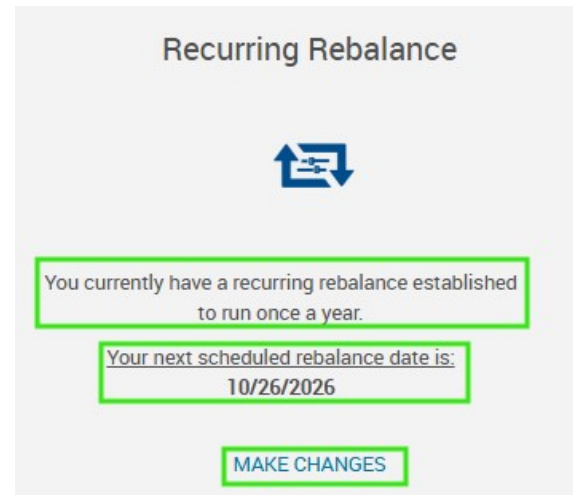
Setup Recurring Investment Rebalance

From the top menu options choose **Investments** then **Rebalance Options**.



In the **Recurring Rebalance** section, if you already have a schedule setup, the frequency & next scheduled rebalance date will appear as follows.

To add a new or update an existing recurring rebalance choose **MAKE CHANGES**.



To edit or setup a recurring rebalance, complete the following sections:

How often you would like to rebalance:

- ☐ Once a year
- ☐ Twice a year
- ☐ Every three months
- ☐ Every month

Set date of first rebalance.

We do not allow you to change the Select a day to rebalance your portfolio option as RPC only allows rebalances on the 26th day of the month.

Enter threshold percent for rebalance.

Click **Next**.



Setup Recurring Investment Rebalance

Review your request and Click **SUBMIT**.

Rebalance  Recurring Rebalance

Overall Progress: **50% Complete**

Recurring Rebalance

Frequency	Rebalance Day	Next Scheduled Rebalance Date	Rebalance Threshold
Once a year	26	10/26/2026	1%

A confirmation will be sent to: lyndag@wealthfirm.info. [edit email address](#)

CANCEL **BACK** **SUBMIT**

To **Turn OFF** an existing recurring rebalance schedule:

Toggle the green button to **OFF**, it will turn all the selections gray.

Click **Next**.

A message will appear: “You have elected to cancel your auto-rebalance election.”

Click **SUBMIT**.

Rebalance  Recurring Rebalance

Overall Progress: **0% Complete**

☒ **ON**

How often would you like to rebalance?
Once a year

Select a day to rebalance your portfolio
26

Set date of first rebalance
10/26/2026

Enter threshold percent for rebalance
Recommended minimum: 1%
1 %

Rebalance will only occur if the difference between your allocation percent for any account and your current balance in that account exceeds the entered percent. Should ALL accounts fall below the threshold when the difference is calculated, no transfer will occur.

CANCEL **NEXT**

Rebalance  Recurring Rebalance

Overall Progress: **100% Complete**

 **Confirmation Number 228135.** Your request has been processed.

DONE

You will be provided a **Confirmation Number** for your records. An email confirmation will also be sent.

Click **Done**.