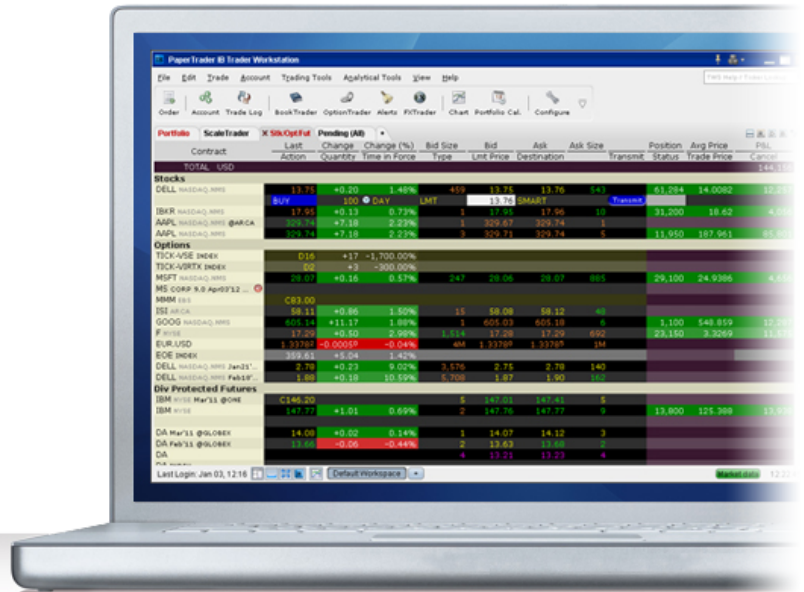


## How Do I Upgrade to Portfolio Margin?

Customers who maintain a balanced portfolio of hedged positions could benefit from lower margin requirements and greater leverage using IB's Portfolio Margin account.

Customers who are currently approved for options trading and who maintain an account minimum of USD 110,000 are eligible to apply for an account upgrade to Portfolio Margin. Portfolio Margin is calculated for cash and equity products only; futures margin is always calculated and applied separately using the SPAN margin algorithm.



### To upgrade to a Portfolio Margin Account in Account Management Version 2.0

1. Log into Account Management from the Login menu on the IB website, using your IB username and password.
2. Click **Manage Account** > **Settings** > **Configure Account** > **Account Type**.
3. From the Account Type dropdown, select *Portfolio Margin*.

A screenshot of the Interactive Brokers Account Management interface. The top navigation bar includes Home, Trade, Reports, Funds, Manage Account, Reference, Education, Support, and Funding. The "Manage Account" section is expanded to show Account Information, Settings, Security, Access Rights, and Add Accounts. The "Settings" section is further expanded to show Configure Account, Paper Trading, Account Alias, User Information, Change Email Address, and Close Account. The "Configure Account" section is expanded to show Base Currency, Institutional Services, Account Type, and Funds Sweep. The "Account Type" section is highlighted, and a dropdown menu is open, showing "Reg T Margin" (selected), "Reg T Margin", and "Portfolio Margin". A "Continue" button is visible at the bottom of the page. Green arrows and numbers 1, 2, and 3 indicate the steps to reach the "Portfolio Margin" option.



Please note that Portfolio Margin upgrades are subject to review, and may be declined for various reasons including a noted increase in your margin requirements upon upgrade of an account from Regulation T to Portfolio Margin.



Approval may take several days, and you will be notified by email when your request is approved. If the request is declined due to an increase in margin under Portfolio Margin, you will be informed via a Customer Service Help Ticket, and may respond accordingly.

**Resources:**

[Margin Account Types](#)

[Understanding Portfolio Margin](#)

[TWS Demo with Portfolio Margin Comparison](#)