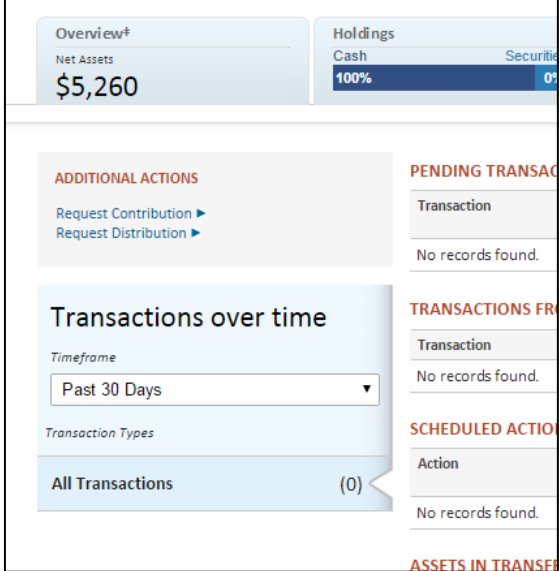


# Liberty ACH Contribution Workflow

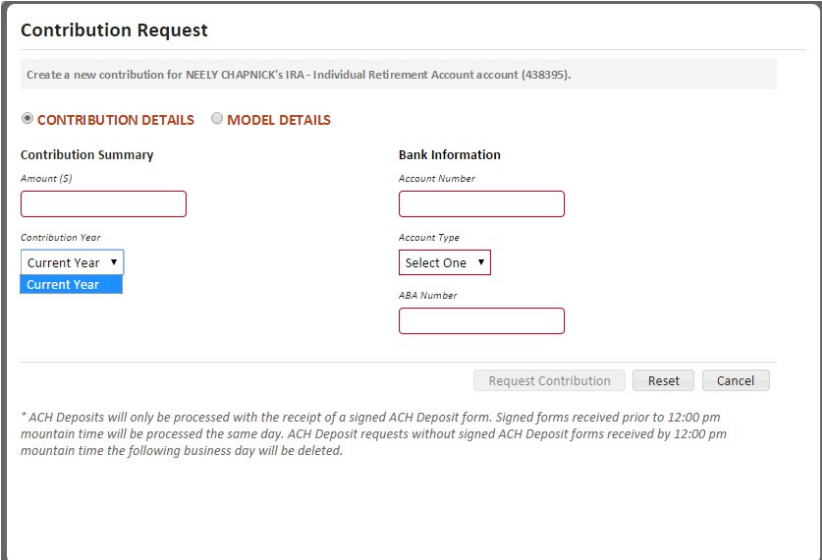
1) ACH Contribution functionality is accessible from the Transactions Page.



The screenshot shows a dashboard with the following sections:

- Overview\***: Net Assets \$5,260
- Holdings**: Cash 100%, Securities 0%
- ADDITIONAL ACTIONS**: Request Contribution ►, Request Distribution ►
- Transactions over time**: Timeframe dropdown set to 'Past 30 Days', Transaction Types section with 'All Transactions (0)'
- PENDING TRANSACTIONS**: Transaction, No records found.
- TRANSACTIONS FROM**: Transaction, No records found.
- SCHEDULED ACTIONS**: Action, No records found.
- ASSETS IN TRANSIT**: (partially visible)

2) You can create an On Demand ACH contribution by entering a dollar amount, the Contribution Year (for qualified accounts) and bank information.



**Contribution Request**

Create a new contribution for NEELY GHAPNICK's IRA - Individual Retirement Account account (438395).

CONTRIBUTION DETAILS  MODEL DETAILS

**Contribution Summary**

Amount (\$)

Contribution Year

**Bank Information**

Account Number

Account Type

ABA Number

\* ACH Deposits will only be processed with the receipt of a signed ACH Deposit form. Signed forms received prior to 12:00 pm mountain time will be processed the same day. ACH Deposit requests without signed ACH Deposit forms received by 12:00 pm mountain time the following business day will be deleted.

# Liberty ACH Contribution Workflow

3) Review how your contribution will be invested by selecting Model Details

**Contribution Request**

Create a new contribution for NEELEY CHAPINICK'S IRA - Individual Retirement Account account (438395).

CONTRIBUTION DETAILS  MODEL DETAILS

Model	Contribution (%) Allocation	Contribution (\$) Allocation	Special Handling	Market Value*	Available Cash
I-DOME-DOMESTIC GROWTH	64.00%	\$0.00		\$43,027.72	\$0.00
25-DOME-DOMESTIC MODEL	36.00%	\$0.00		\$23,617.80	\$0.00
	<b>100.00%</b>	<b>\$0.00</b>		<b>\$66,645.52</b>	<b>\$0.00</b>

Request Contribution   Reset   Cancel

\* Values calculated using most recent closing price.

4) Request your contribution and view any messages or alerts

**Contribution Request**

Your contribution request could not be processed.

Messages and Alerts

Alerts

No Alerts

Messages

Invalid ABA Number

Done   Return To Contribution

Please contact your relationship manager with questions