

Enhanced income by model performance on Liberty



Beginning July 22, 2022, we will have updated the income by model section within Liberty in an effort to provide more efficient and easier access to detailed information. Previously, users would select each individual model to view detailed information regarding short-term and long-term gain/loss information. Previously, the section in Liberty looked like this:

INCOME BY MODEL 2021 ⓘ

Summary Journals

Model	Dividends	Interest	Realized Gain/Loss	Capital Gains	Total Earnings Year-to-Date
-------	-----------	----------	--------------------	---------------	-----------------------------

Following our update, this section now details the performance information for short-term and long-term for realized gain/loss and capital gains.

INCOME BY MODEL 2022 ⓘ

Summary Journals

Model	Dividends	Interest	Realized ST Gain/Loss	Realized LT Gain/Loss	Capital Gains ST	Capital Gains LT	Total Earnings Year-to-Date
-------	-----------	----------	-----------------------	-----------------------	------------------	------------------	-----------------------------

We made this change based on your feedback on how we can enhance Liberty for you and your clients. As always, we appreciate your input.

If you have any questions or concerns, please contact your Client Service Advocate.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

Axos Advisor Services is a trade name of Axos Clearing LLC. Axos Clearing LLC provides back-office services for registered investment advisers. Neither Axos Advisor Services nor Axos Clearing LLC provides investment advice or make investment recommendations in any capacity. Securities products are offered by Axos Clearing LLC, Member FINRA & SIPC. Axos Clearing, LLC does not provide legal, accounting, or tax advice. Always consult your own legal, accounting, and tax advisers.