

**Don't forget to use
Liberty's tax harvesting
feature for year-end
planning**



The built-in tax harvesting feature in Liberty is a powerful tool you can use to lessen the impact of taxes on your clients' taxable portfolios. The tool enables you to easily view and sort investments within an account by short-term or long-term losses or gains and then realize those losses or gains to manage this year's tax impact to the portfolio.

Axos Advisor Services has enhanced the tax harvesting feature by enabling you to harvest losses at the model level as well as at the individual security level. Model-level tax harvesting allows you to view a comprehensive tax harvesting dashboard where you have all you need to make informed tax-sensitive trade decisions for a particular model.

- You can view gain/loss information for taxable accounts assigned to the selected model.
- You can view gain/loss information for the securities held in a selected model.
- You can view tax harvesting data at the account level or the security level.
- You can filter, view, and select taxable accounts within a given model to participate in a tax harvesting event.

Tax harvesting is an effective tool to help clients potentially increase after-tax returns, while helping you to differentiate your value-added services from the competition.

To learn more about the benefits of tax harvesting and how easy Liberty makes implementing this strategy, download the flyer. Or contact your Client Service Advocate for a demo or to activate the feature.

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

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