

## Additional Features Now Available in Liberty

Please review the consolidated [Liberty Office and Client Management User Guide](#) and [Liberty Trading User Guide](#) to learn more about the features now available on Liberty.

In Summary, the following features are now available:

- **Ability to Print Additional Reports from Liberty:** A PDF record of the following can be created from Liberty and saved locally, in order to keep a permanent record:
  - o **Trade Processing and Alerts/Messages:** This report generates from the existing Create Report button on the Trade Processing Summary dialog box and reflects all messages and alerts related to trading events. A summary section is also included for approved and killed trades. (*Liberty Trading User Guide Page 151*)
- **Liberty Holdings and Trading Views now Include Gain/Loss, Tax Lot and Goal % Information:** In order to provide you more of the information you need, where you need it, the Account Trading and Account Holdings have been modified to include Model goal percents, and unrealized short/long term Gain/Loss; Account Trading views now include tax lot information.
- **Standard Reports Now Include the Option to View Closed Accounts:** When a user enters account ID as criteria for which account to run a Standard Report, you now have the ability to include closed accounts.
- **Account Memos and Reminders Available December 15:**
  - o You now have the ability to create, modify and manage account memos on Liberty – as referenced on Pages 60-62 of the Office and Client Management User Guide
  - o Reminder notifications can now be set up on account memos and fall into many categories as referenced in the Office and Client Management User Guide Pages 17-19

For your ease of reference, all [Liberty User Guides](#) are now available on Liberty and at <http://riaconnection.trustamerica.com/> under Quick Links to the right of our RIAconnection web page.

Please let your relationship manager know if you have questions or would like a demonstration of any Liberty features.