Liberty Training Webinars

Don't miss these 30-minute Training Genius-Session webinars!

Join us for a series of webinars designed to help you transition to Liberty. Stay tuned for upcoming registration invitations via email and RIAconnection. Please refer to schedule for webinar date & times.

Note that all Webinars will begin at 2:15pm MT and expected to last about 30 minutes.

Webinar Sessions by Week	Date	Presented by
1. Model Creation/Editing a. Create model b. Edit Model c. Model Trading options Composite Model/Cross Model a. Creating/Editing b. Processing Options	Thursday, June 1	Matt Hodges/Melissa Mooney
2. Trade Creation/Types of Trading a. Advanced Trading – Tax Status, Cash Demand, etc. b. Intermodel Transfers Trade Creation/Types of Trading a. Block Trading b. CAM	Thursday, June 8	Matt Hodges/Lawrence Matthews
3. Blotter Management/Order Queue a. Approve/Kill trades in blotter b. Modify Trades in blotter c. Approve/kill/modify intermodel transfers d. Modify instructions in order queue	Thursday, June 15	Lawrence Matthews/Melissa Mooney
4. Opening Accounts/E-Signature a. DocuSign Process Account Details/Overview a. View Account Registration b. Edit Model allocations c. Add Change Rep d. View Beneficiaries e. View/Edit Fee Schedules/Families f. Fee Payments g. Systematics h. Terminating an account	Thursday, June 22	Jennifer Teter/Kae Schissler

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5. Dashboard/Holdings/Performance a. Dashboard Information b. Reports c. Current/dated holding view d. Current /dated performance view Transactions/About Your Account a. Transactions data b. Request Contribution c. Request Distribution d. Place Cash Demand e. Statements f. Tax Documents g. Electronic Delivery h. View Authorizations/Beneficiaries Account Trading a. Model Processing b. Cross Model c. Individual trades d. Intermodel Transfers	Thursday, June 29	Daniel Cohen/Robert Nagle
6. Client Management a. Account Lists b. Create New Rep c. Create Statement Family d. Create Fee Family e. Reset Password f. View/Edit Cash Demands General Information a. Account Search b. Bulletins c. Finding Forms d. Firm Analytics Documents a. Bulletins b. Standard Reports c. Custom Reports(when available)	Thursday, July 6	Graham Johnson/Neil Rogers