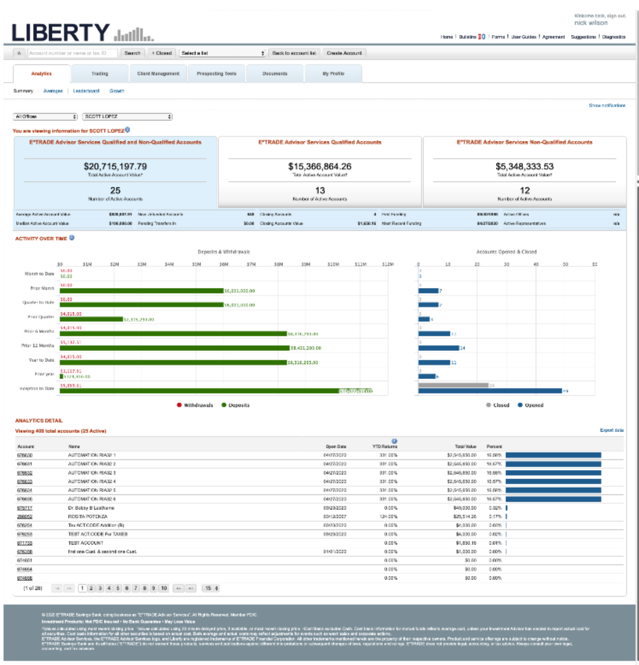
Enhanced Liberty features

To further enhance your Liberty experience, the following features are available on May 22, 2020.

Transfer on Death/Beneficiary fields on Liberty will be more aligned:

- Beneficiary fields on the Account Details and About Your Account screens available to applicable Qualified accounts (IRA, Roth IRA, Rollover IRA, Simple IRA, SEP IRA, SARSEP IRA, Beneficiary IRA, Roth Beneficiary IRA).
- Transfer on Death fields on Account Details and About Your Account screens available to applicable Non-Qualified accounts (Individual, Joint (Community Property WROS), Joint (Tenants by the Entirety).

*** **Coming very soon - YTD Performance to the Rep Analytics Page**:
A new column now presented to Professional Users under the Analytics Detail on the Analytics screen referencing YTD Returns for representatives. Returns are true YTD and include the year's completed months plus the partial month minus one day. Performance will not display for closed or external (aggregated) accounts. All IA's and only IA's will see the new column.



Let your relationship manager know if you're interested in a demonstration or have questions.