The **Potential Gain/Loss** filter option allows you to search for accounts that have a potential gain or loss so that you can determine if you want to add the account to a block sell or exchange.

The Potential Gain/Loss feature filters all accounts within a block sell or block exchange to show any accounts that have a potential gain or loss. The calculation uses the Tax Lot Relief method - does not account for each individual’s election. The calculation is based on the trade lot information, not actual tax lots. Once accounts are identified, you can choose whether to add them to the trade or not.

You can navigate to the Potential Gain/Loss filter by navigating to the *Trading* tab and selecting the **Block Trading** link. The Potential Gain/Loss filter is located under the **Select Accounts** Search and Filter area.

Please review the *Liberty Trading – Block Trading User Guide* to learn more about this and associated Block Trading features.

Let your relationship manager know if you have questions or are interested in a demonstration of the Block Trading features.