

## Added Features Now Available in Liberty: Assets in Transfer Notes, Interested Parties, View Maintenance and Transaction Fees and Create Custom Reports

As we prepare to retire TCAAdvisor in Q3 2017, TCA continues to migrate functionality to Liberty.

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

In summary:

- **Assets In Transfer Notes:** You can access from the Transactions tab for an account and select a Transferring Firm in the Assets in Transfer table. When viewing the transfer details, you are able to determine the current status of the specific transfer you are accessing. (Page 69)
- **Interested Parties:** On the Interested Parties screen you can now search, view, add, edit and remove interested parties to an account in Pending status. (Page 35-36)
- **View Maintenance and Transaction Fees:** You can now view these schedules for pending, open and closed accounts. (Page 41-42)
- **Custom Reports:** You may now obtain reporting information that is not contained in a standard report. The information may be exported into a Microsoft Excel-compatible format. (Page 76-83)

For your ease of reference, all Liberty User Guides are now available 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 this or any Liberty features.