

TCA Introduces Tax Harvesting on Liberty



TCA now offers tax harvesting in Liberty. TCA's tax harvesting feature in Liberty is a powerful tool you can use to lessen the impact of taxes on your clients' taxable portfolios. The tool enables you to easily view and sort investments within an account by short-term or long-term losses or gains and then realize those losses or gains to manage the tax impact.

With the TCA tax harvesting feature you can:

- Help clients manage capital gains taxes
- Help clients potentially increase after-tax returns
- Differentiate your value-added services from the competition

TCA's tax harvesting feature makes it easy for you to maintain market exposure on the sales proceeds of those transactions during the 30-day wash sale period. The tool will allow you to select an alternative security to invest in during the 30-day period before re-investing.

TCA makes tax harvesting easy. Don't miss out on this opportunity to help clients manage their taxes.

Review the *Tax Harvesting User Guide* and *Tax Harvesting Flyer* for details.

For more information on the TCA tax harvesting feature in Liberty, please contact your TCA relationship manager.