

Ability to Create Security Groups Now Available in Liberty



As TCA continues to migrate functionality to Liberty, the ability to create security groups is also now available.

Security groups allow rules to be set that drive the buying and selling patterns for securities within a model. Groups can also be used to determine investor holdings based on account type, allowing for taxable and non-taxable accounts to have different holdings.

Please see the Liberty Security Groups User Guide to learn more about this feature.

Let your relationship manager know if you have questions and/or would like a demonstration of this feature.