

Additional Features Now Available in Liberty

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

In Summary, effective February 16, the following features are available:

- **Ability to Change Routing Method in the Blotter:**
 - o Default routing method can now be changed directly on the Blotter by selecting the appropriate method from the routing method dropdown
 - o Routing methods include: Standard (MFs), Electronic (Equities), TCA Desk (Manual for Equities), Managed Electronic for equities which allows you to approve without releasing the entire to market all at once while ensuring investors receive the same average execution price
 - o Review the [Liberty Trading User Guide – Blotter Trade Orders – Changing Routing Method](#)

- **Ability to Mark a Model as Do Not Use:**
 - o You now have the option to select a zero value model so that it doesn't show up in your list of models or during model processing
 - o To reinstate the model, contact your relationship manager
 - o Review the [Liberty Trading User Guide – Models – Modify Models](#)

- **COMING SOON - - Bulletins for Representatives:**
 - o You will be able choose to opt-in your representatives to receive bulletins on the Client Management tab in Liberty. Select the Representatives link in the sub-navigation, Select the Representative, Click the Edit button, Select the checkbox labeled 'Receive Bulletins' and click **Save**.
 - o Review the [Liberty Office and Client Management User Guide – Representative Bulletins](#)

- **Ability to Print and Export Bulletin Information:**
 - o A Bulletin Report can be created which allows you to choose Selected Bulletin Summaries, Selected Bulletin Summaries and Details, All Bulletin Summaries, and All Bulletin Summaries and Details
 - o Review the [Liberty Office and Client Management User Guide – Bulletins – Bulletin Report](#)

- **Ability to Print Additional Reports from Liberty:** A PDF record of the following can be created from Liberty and saved locally, in order to keep a permanent record:
 - **Trade Order Report:** You can now view and download all accounts associated with a trade order. A Trade Order Report renders in a separate tab for permanent record of your trade orders - [Liberty Trading User Guide – Trade Order Report](#)

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- **Manage Model View Report:** You can print a report from the Model Process screen that shows the model holdings for client reviews - [Liberty Trading User Guide – Trading Models – View Security Details](#)
- **Model Process Report:** You now have the ability to create a report after Model Trade Processing to view the results of your trade. Report is created from the Process Model Trades - [Liberty Trading User Guide Liberty Trading User Guide – Models – Model Process Summary](#)
- For your ease of reference, all Liberty User Guides are now available on Liberty and 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 any Liberty features.