

# Additional features now available in Liberty



Please review the *Liberty Office and Client Management User Guide*, the *Liberty Trading User Guide*, the *Liberty Guide for Representatives & Financial Advisors* and the *Liberty Investor User Guide* available on Liberty to learn more about the features available on Liberty.

The following new features are now available:

- **Create account list from query**
  - o You now have the ability to create actionable account lists from queries based on specific sets of fields you select
  - o First, navigate to the Client Management tab, next click on Accounts and Account Queries, then you can select your query and create an account list based on the various definition fields
  - o Please review the [Liberty Office and Client Management User Guide - Account Query](#) to learn more
  
- **Composite TWR enhancements**
  - o Increased pagination selections so users can choose to see all accounts
  - o A new filter for beginning and ending cash so users can now easily customize and filter accounts
  - o A new confirmation message to confirm changes before a composite TWR report is initiated
  - o New messaging to confirm users understand that they must save changes before leaving the page
  - o An updated print report to include the new screen changes and display filters within the report
  - o Please review the [Liberty Trading User Guide – Models – Composite TWR](#) to learn more
  
- **Pending Transaction, Model View enhancements**
  - o You can view pending transactions by Model Summary, which shows the running cash balance of models that currently hold value in the account, allowing you to see overdrafts or potential overdrafts in specific models
  - o Please review the [Liberty Trading User Guide – Account Level Trading – Pending Transactions](#) to learn more
  
- **Ability to “Search by Instruction” in the trade blotter**
  - o A “Search By Instruction” feature has been added so a user can customize their view of records shown on the blotter screen

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- Please review the [Liberty Trading User Guide - Blotter - Trade Orders - Search and Filter](#) to learn more
  
- **Income by Model, Journal View Details**
  - Year-to-date values for each model in a Liberty account are displayed for all models combined based on the year selected in the drop-down menu. You may view this information for each year the account has been open.
  - There are two ways to view yearly statistics. You can view the information using the Summary View or the Journals View.
    - The [Summary View](#) displays an overview of the yearly statistics for the selected account.
    - The [Journal View](#) displays the transactions that resulted in the earnings information for the selected Liberty account. The default view for Journals is collapsed to hide the filters for viewing the transactions by Interest, Dividends, Capital Gains Distribution, and Realized Gains and Losses. To filter the transactions, select the “Advanced” link above the table on the right, which will display filters for Model and transaction type.
  - Please review the [Liberty Guide for Representatives & Financial Advisors - Performance/Income – Income By Model](#) and the [Liberty Investor User Guide - Performance/Income – Income By Model](#) to learn more.
  
- **RFS Fee Schedule Report**
  - This new Standard Report in Liberty now allows you to review your fee schedules—details include fee schedule name and number, min/max fees, frequency, etc.

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

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