

Did you know...

Ability to Create Account Lists Now Available in Liberty



Did you know you have the ability to create account lists in Liberty?

Account lists can be used to efficiently organize a variety of accounts into one group to better manage them. To create an account list, you simply select a group of accounts and assign a name to the group. These lists may be shared with others or kept private.

You can use account lists throughout Liberty, including trading and for various reports. Account list management is accessed from the Accounts section of the Client Management tab.

Creating account lists can help you be more efficient and help you use the Liberty platform to its fullest.

If you have any questions regarding account lists, please contact your relationship manager.