

Did you know...

Bulk Intermodel Transfers in Liberty



When you are making changes to an investment strategy that impacts multiple accounts at a time or when you are moving an asset from one strategy to another, it can save you time and improve your efficiencies by executing bulk intermodel transfers in Liberty.

You can bulk transfer securities and cash between models based on a list of accounts by following these easy steps:

1. Navigate to the Generate Transfers page
2. Select the transferring model and receiving model
3. Set the transfer method and define the asset percentage to transfer
4. Select the assets to transfer
5. Add accounts to include in the transfer
6. Process the transfer

Bulk intermodel transfers is one more way we help you simplify investment management.

If you have any questions regarding bulk intermodel transfers, please contact your relationship manager.