

Did you know...

Goal % and Actual % available on Liberty



Did you know that Liberty provides analytic tools that can help you review the holdings in various accounts? As a Professional Liberty user, you can view the Goal % and Actual % under the Account Holdings tab. This data is not viewable by your representatives or account owners.

When “View by Model” is selected on the Account Holdings tab, the **Goal %** and **Actual %** is displayed in the Holdings table.

Selecting a model in the above table enables the columns to appear in the lower table. Goal % is always as of current date, even when viewing for historical or future dates.

If you have any questions regarding the blotter report, please contact your relationship manager.