Enhanced Liberty Features:

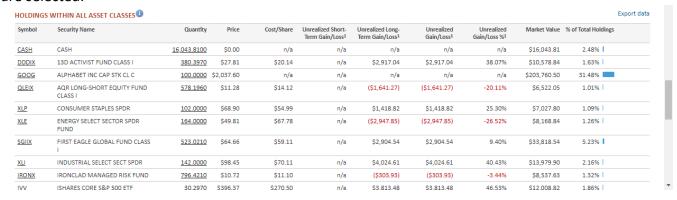
- 1. Cost/Share Added to Holdings
- 2. MTD and QTD Returns Added to Analytics



To further enhance your Liberty experience, the following features will be available on April 23, 2021. As always, your feedback is important to us. As you begin using these new features, please share your input with us.

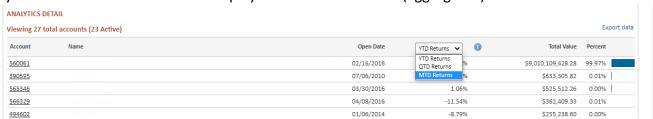
1. Cost/Share added to Holdings table

Cost/Share will be added to the Holdings table on the Holdings screen in Liberty. Cost/Share is the total cost basis of all available tax lots divided by the total number of shares. Tax lots where cost basis is unavailable will be excluded from the value. Note: Cost/Share is not available when multiple models are selected.



2. MTD and QTD returns added to Analytics

We will be adding month-to-date (MTD) and quarter-to-date (QTD) returns to the year-to-date (YTD) returns already available for each of an RIA's active accounts on the Analytics Detail table. Returns are the performance from the first day of the current period indicated through current date minus one day. Performance returns will not display for closed or external (aggregated) accounts.



We hope you find these new enhancements to Liberty useful. Please contact your Client Service Advocate with any questions or concerns.

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