

Interim Income Report Now Available in Liberty



An Interim Income Report is now available as a standard report in Liberty and provides income information from sources such as dividends, interest payments, and gains or losses from the sale of assets.

Parameters include a From Date and To Date for the requested account number as shown below. The From and To dates must be within the same calendar year. The report is available in a text format.

The screenshot displays the Liberty web application interface for selecting a standard report. At the top, there is a search bar with the placeholder text "Account number or name or tax ID" and a "Search" button. Below the search bar are navigation tabs for "Analytics", "Client Management", "Documents", and "My Profile". The "Documents" tab is active, and within it, the "Standard Reports" sub-tab is selected. The main content area is titled "SELECT A STANDARD REPORT" and features a "Filter" input field. Below this, a list of report options is shown under the heading "Viewing 6 of 6 results". The "Income Report" option is selected with a radio button. To the right of the selected report, there is a description: "INCOME REPORT: Dividend, interest, Gain Loss data of a single account in a date range." Below the description are fields for "Report Title" (set to "Income Report"), "Shared/Private" (set to "Shared"), "From Date", "To Date (cannot cross years)", and "Account ID (only 1 allowed)". A "Search" button is located at the bottom right of the form area.

Let your relationship manager know if you have questions about this report.