

Minimize Taxable Impacts by Recalculating Potential Gain/Loss in a Trade Order

Effective January 19, 2018, you have the ability to change a share quantity and recalculate the potential gain/loss directly in a Trade Order, thereby enhancing the ability to make informed decisions to minimize taxable impacts of a trade

Please review the Liberty Trading Guide: Blotter - Trade Orders – Recalculate Potential Gains/Losses to learn more about this feature and the new functionality in Liberty.

For your ease of reference, all Liberty User Guides are now available on Liberty and at <http://riaconnection.trustamerica.com/> under Quick Links to the right of our RIAconnection web page.

Please let your relationship manager know if you have questions or would like a demonstration of any Liberty features.