

**Liberty Tax Harvesting
now supports selling
individual tax lots**



Liberty tax harvesting now supports selling individual tax lots.

We've enhanced the tax harvesting feature to make tax planning easier and more efficient than ever before by allowing the harvesting of individual tax lots for a holding.

Previously, you could employ tax harvesting at the individual investment level within accounts. This new feature provides you the utmost in flexibility, allowing you to perform tax harvesting based on each client's needs: At the individual tax lot, product, or model level.

Utilizing the tax harvesting feature in Liberty, you can easily run and analyze different scenarios to determine the tax harvesting strategy that works best for a specific model.

Liberty provides multiple tax harvesting methods for creating the desired trades. These include:

- **Maximize losses** - This method takes all available short-term and long-term losses for the selected taxable accounts.
- **Short-term losses only** - This method takes all available short-term losses for the selected taxable accounts.
- **Long-term losses only** - This method takes all available long-term losses for the selected taxable accounts.

The tax harvesting feature is available in Liberty at no additional cost with no additional paperwork. Don't overlook this effective way to provide your clients with significant value and clearly differentiate yourself from the competition.

If you have any questions about the tax harvesting feature in Liberty, please see the Liberty Trading User Guide or contact your Client Service Advocate.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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