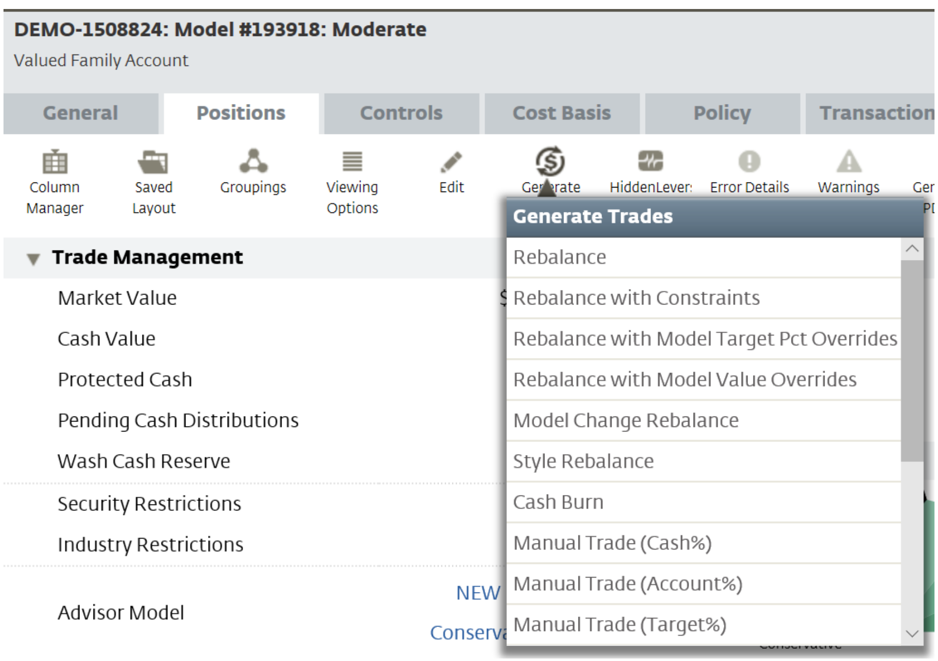
LIBERTYFI

CHEAT SHEET

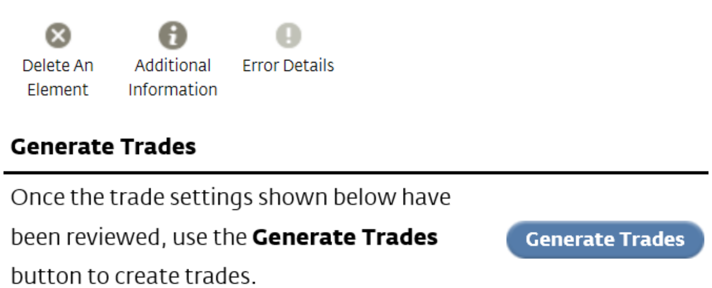
REBALANCE ACCOUNT

1. Search for the account via quick search or Client Tab

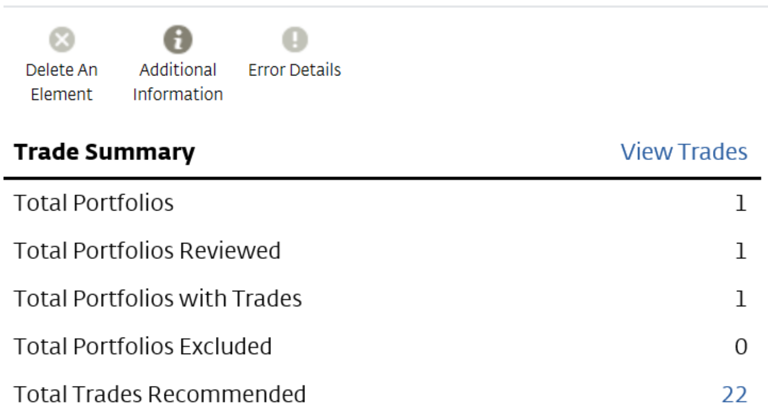
2. Rebalance: Navigate to the **Positions Tab** (account level)
   - Select the icon **"Generate Trades"**
   - Select **Rebalance**



3. Generate Trades: Click **Generate Trades**



4. Trade Summary:
    - Review Trades
    - Once Reviewed, Click **View Trades**



5. Trade Generation:
    - Pro Tip – we always encourage that trades are staged, especially when rebalancing accounts. Reference Staging Trades in the Trading section to learn more.
    - Select **Manage Trades**, then click **Submit Trades**