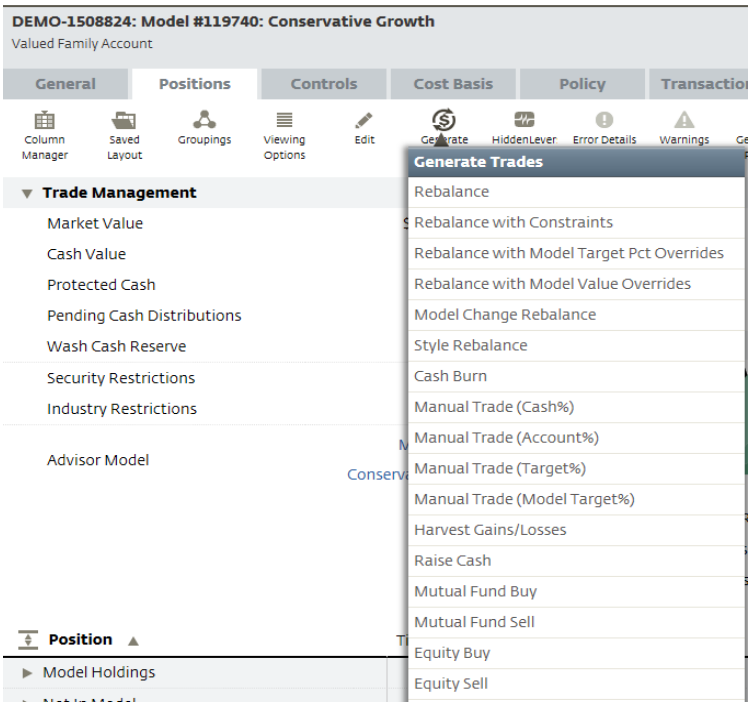
LIBERTYFI

CHEAT SHEET

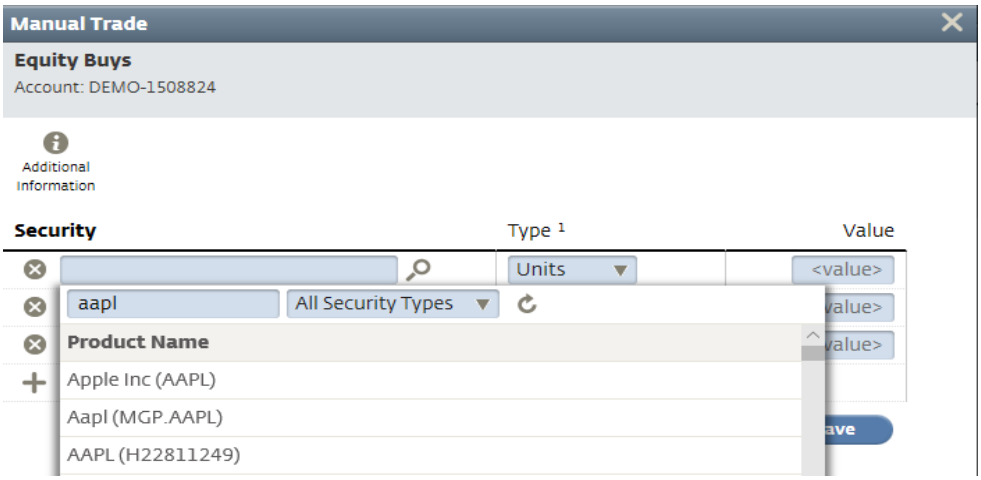
SINGLE ACCOUNT TRADING – Equities & ETF's

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

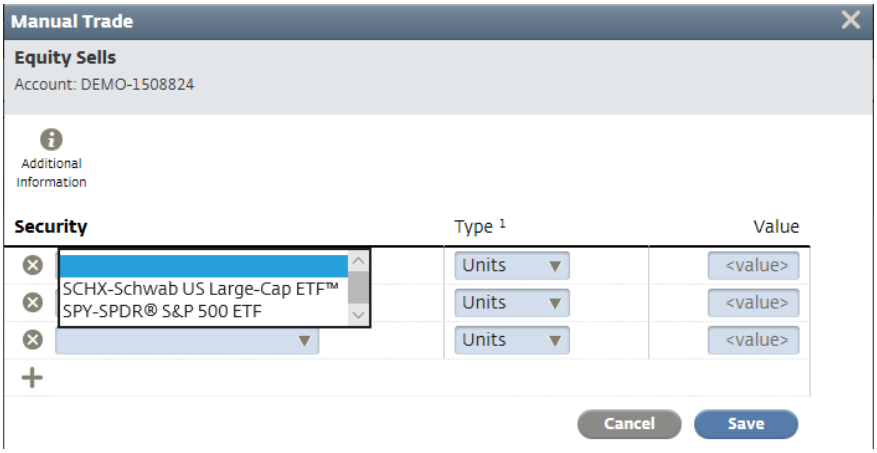
2. Generate Trades: Navigate to the **Positions Tab**
   - Select the icon **"Generate Trades"**
   - Select **Equity Buy** or **Equity Sell**



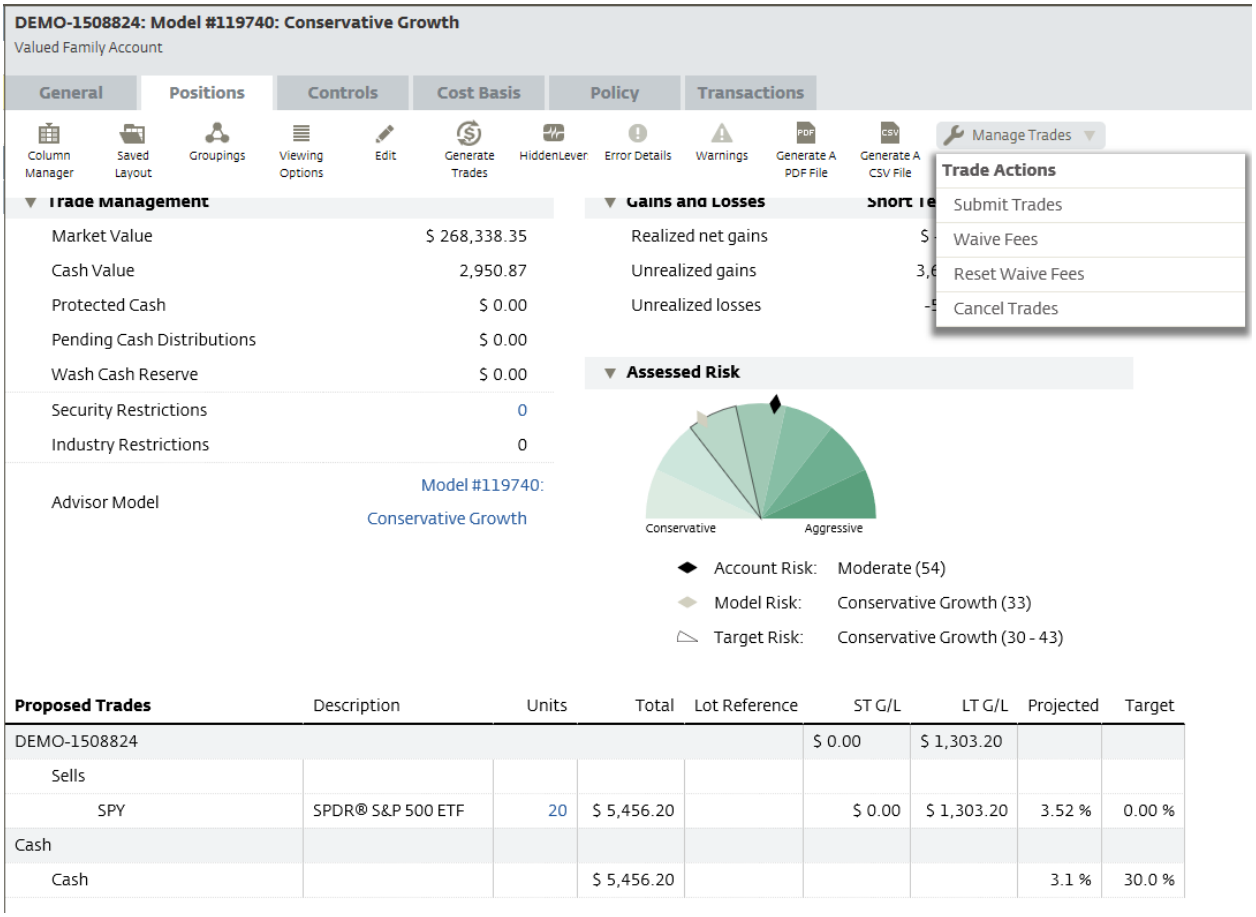
3. A) Manual Trade: **Equity Buy**
    - Enter the individual equity and/or ETF Ticker by clicking on "Magnifying glass"
        - You can enter multiple tickers at the same time. This order can contain individual equities and ETF's.
    - Select Units
    - Enter the Value, Click **Save**



B) Manual Trade: **Equity Sell**
- Select the ETF or individual equity from the dropdown
    - All of the equities and ETF's available to sell in the account will populate
    - You can sell multiple tickers in one order
- Enter the Units, or Percentage
- Enter the Value, Click **Save**



4. Trade Generation:
   - Review Proposed Trades at the bottom
     - The Account Risk will change appropriately, based on the proposed trades
   - Select **Manage Trades**, then click **Submit Trades**



Proposed Trades	Description	Units	Total	Lot Reference	ST G/L	LT G/L	Projected	Target
DEMO-1508824					$ 0.00	$ 1,303.20		
Sells								
SPY	SPDR® S&P 500 ETF	20	$ 5,456.20		$ 0.00	$ 1,303.20	3.52 %	0.00 %
Cash								
Cash			$ 5,456.20				3.1 %	30.0 %

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