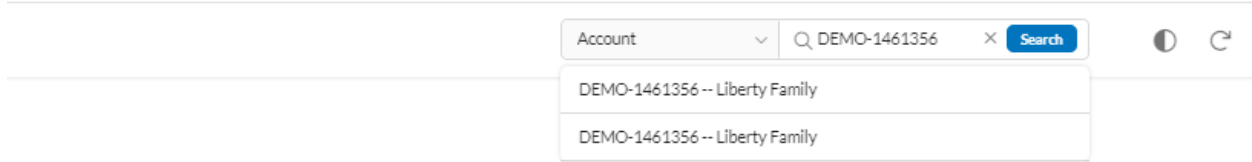


1. Search for the account via quick search or Client Tab



2. Navigate to the **Service Tab**

- a. Click the “+” icon next to the registration from which you are raising cash
- b. Select **Trade Hold**

Liberty Family



Goal / Registration / Invested	Value	Prc
Goal Liberty Family IRA - Rollover	\$ 5,544,118.98	
<ul style="list-style-type: none"> Reg 1093343 IRA - Rollover <ul style="list-style-type: none"> DEMO-1461356 Reg 1093344 IRA - Rollover <ul style="list-style-type: none"> DEMO-1461354 Reg 1093345 IRA - Rollover <ul style="list-style-type: none"> DEMO-1461355 Reg 1093346 IRA - Rollover <ul style="list-style-type: none"> DEMO-1461353 Reg 1093347 IRA - Rollover <ul style="list-style-type: none"> DEMO-1461352 	<ul style="list-style-type: none"> \$ 1,908,144.29 \$ 1,908,144.29 1,103,475.48 1,103,475.48 1,236,469.81 1,236,469.81 653,136.43 653,136.43 642,892.97 642,892.97 	<ul style="list-style-type: none"> Mo JPI Ear Kay Co

3. Properties: Enter the Reason Code, Follow-up Date, & Comment
 - a. Check **Accept**
 - b. Click **Save + Next**

Trade Hold | SR# 2888474
Liberty Family - Reg 1093343 - IRA - Rollover

Properties Options Review & Submit

Properties

SR#
2888474

Owner
Liberty Sample

Action
Add Trade Hold

Reason Code
Account Traded Off Platform

Follow-up Date
04/19/2024

Comment

Comments entered will be for informational purposes only and should be used to describe why the Trade Hold has been placed. Further trade instructions entered as comments will not result in generating trade tasks to Investnet Operations. No further action will be taken.

Accept

Cancel Save **Save + Next**

4. Options:
 - a. Click **Edit**
 - b. Check the box to **Enable Trade Hold** (or **Disable Trade Hold** if disabling)
 - c. Click **Save + Next**

Trade Hold | SR# 2888474
Liberty Family - Reg 1093343 - IRA - Rollover

Properties Options Review & Submit

Investment	Current Trading Status	Select for Trade Hold	Actual Product
DEMO-1461356	Not on Trade Hold	<input checked="" type="checkbox"/>	\$ 1,908,144.29 Model #716195: Moderate Growth

Cancel Save **Save + Next**

5. Review & Submit:
 - a. Click **Submit Request**