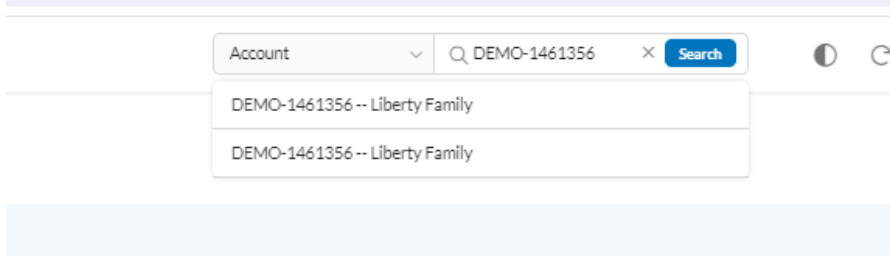


1. Search for the account via Quick Search or Client Tab



2. Navigate to the **Service Tab**
 - a. Click the “+” icon next to the registration from which you are raising cash
 - b. Select **Raise Cash**

Liberty Family

Financials General **Service** Billing Documents Policy Proposals

Goal / Registration / Invested	Value	Pr
▼ Goal Liberty Family IRA - Rollover	\$ 5,544,118.98	
▼ Reg 1093343 IRA - Rollover	\$ 1,908,144.29	
DEMO-1461356	\$ 1,908,144.29	M
▼ Reg 1093344 IRA - Rollover	1,103,475.48	
DEMO-1461354	1,103,475.48	JF
▼ Reg 1093345 IRA - Rollover	1,236,469.81	
DEMO-1461355	1,236,469.81	Es
▼ Reg 1093346 IRA - Rollover	653,136.43	
DEMO-1461353	653,136.43	K
▼ Reg 1093347 IRA - Rollover	642,892.97	
DEMO-1461352	642,892.97	O

CREATE SERVICE REQUEST

- Raise Cash
- Invest Contribution
- Terminate (Liq/Hold)
- Systematic Withdrawal - Set Up New
- Rebalance Account
- Trade Hold
- DCA Set Up New
- General Request

3. Properties: Enter the Protect Cash Amount, Raise Cash Option, & Withdrawal Method
 - a. Protect Cash Tips:
 - i. Choose Raise Cash to Increase Protected Cash as Raise Cash Option
 - ii. Choose FA/Client will process withdrawal as Withdrawal Method
 - b. Click **Save + Next**

Raise Cash | SR# 2888484 |
 Liberty Family - Reg 1093344 - IRA - Rollover

Properties
Trade Values
Review & Submit

Properties

SR#

2888484

Owner

Liberty Sample

Raise Cash Option

Raise Cash to Increase Protected Cash

Withdrawal Method ?

FA/client will process withdrawal

Amount

\$10,000

Trade Minimum Setting ?

None

Special Instructions ¹

Please note that the Trade Minimum Setting would apply only for Admin and Sponsor Traded Accounts.

Cancel
Save
Save + Next

4. Trade Values: Review the Trade Values and click **Continue**

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

UMA SMA FSP Protect Cash

- a. This will trigger the money manager or UMA portfolio to raise the appropriate cash to be protected

Raise Cash | SR# 2888484 | Amount | \$10,000.00 | Raise Cash to increase Protected Cash
 Liberty Family - Reg 1093344 - IRA - Rollover

Properties
Trade Values
Review & Submit

Account Values	
Allocation Strategy	Default
Cash	\$ 15,402.64
Prot. Cash	\$ 0.00
Prot. Cash Change	\$ 10,000.00

Investment	Actual Value	Target Value	Target %	Trade Value	Trading Note
▼ DEMO-1461354 JP Morgan Equity Income Managed Account	\$ 1,103,475.48	\$ 1,093,475.48	100 %	\$ -10,000.00	

Submit Request