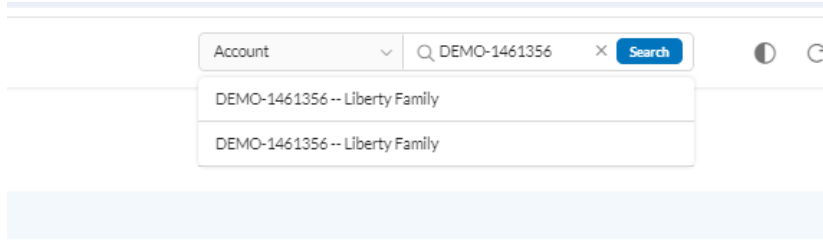


\*\*\*You will have the option to (1) Raise Cash to withdraw, (2) Raise Cash for a future date, (3) Raise Cash to Increase Protected Cash, (4) Raise cash to withdraw and increase the Protected Cash, and (5) Use Existing Cash to withdraw. See Raise Cash Options in Step 3 for further details.

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 |    |
| <ul style="list-style-type: none"> <li>Reg 1093343   IRA - Rollover</li> <li>DEMO-1461356</li> </ul> | \$ 1,908,144.29 | M  |
| <ul style="list-style-type: none"> <li>Reg 1093344   IRA - Rollover</li> <li>DEMO-1461354</li> </ul> | 1,103,475.48    | JF |
| <ul style="list-style-type: none"> <li>Reg 1093345   IRA - Rollover</li> <li>DEMO-1461355</li> </ul> | 1,236,469.81    | Es |
| <ul style="list-style-type: none"> <li>Reg 1093346   IRA - Rollover</li> <li>DEMO-1461353</li> </ul> | 653,136.43      | K  |
| <ul style="list-style-type: none"> <li>Reg 1093347   IRA - Rollover</li> <li>DEMO-1461352</li> </ul> | 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 Withdrawal Amount, Raise Cash Option, & Withdrawal Method
  - a. Withdrawal Method Tips:
    - i. Raise Cash Options:
      1. Raise Cash to Withdraw
      2. Raise Cash for Withdraw at future date – choose raise cash to withdraw option, then type exact details into Special Instructions Box
      3. Raise Cash to Increase Protected Cash
      4. Raise Cash to Withdraw and Increase Protected Cash
      5. Use Existing Cash to Withdraw
    - ii. FA/Client will process withdrawal – Finish the raise cash request. Once you see the cash at the custodian level, you can now send to the client.
  - b. Click **Save + Next**

Raise Cash | SR# 2888504 |  
 Liberty Family - Reg 1093344 - IRA - Rollover

Properties Trade Values Review & Submit

**Properties**

SR#  
2888504

Owner  
Liberty Sample

Raise Cash Option  
Raise Cash to withdraw

Withdrawal Method ⓘ  
FA/client will process withdrawal

Amount  
\$10,000

Trade Minimum Setting ⓘ  
None

Special Instructions <sup>1</sup>

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

4. Trade Values: Review the Trade Values and click **Continue**
5. Review & Submit: Click **Submit Request**
  - a. This will trigger the money manager or UMA portfolio to raise appropriate cash

Enterprise > Accounts > DEMO-1461352 > Liberty Family > Raise Cash

**Raise Cash | SR# 2888504 | Amount | \$10,000.00 | Raise Cash to withdraw**  
 Liberty Family - Reg 1093344 - IRA - Rollover

Properties
  Trade Values
  **Review & Submit**

Account Values

|                     |              |
|---------------------|--------------|
| Allocation Strategy | Default      |
| Cash                | \$ 15,402.64 |
| Prot. Cash          | \$ 0.00      |

| Investment   | Actual Value    | Target Value    | Target % | Trade Value   | Trading Note |
|--|-----------------|-----------------|----------|---------------|--------------|
| <input type="checkbox"/> DEMO-1461354<br>JP Morgan Equity Income Managed Account | \$ 1,103,475.48 | \$ 1,093,475.48 | 100 %    | \$ -10,000.00 |              |

[Submit Request](#)