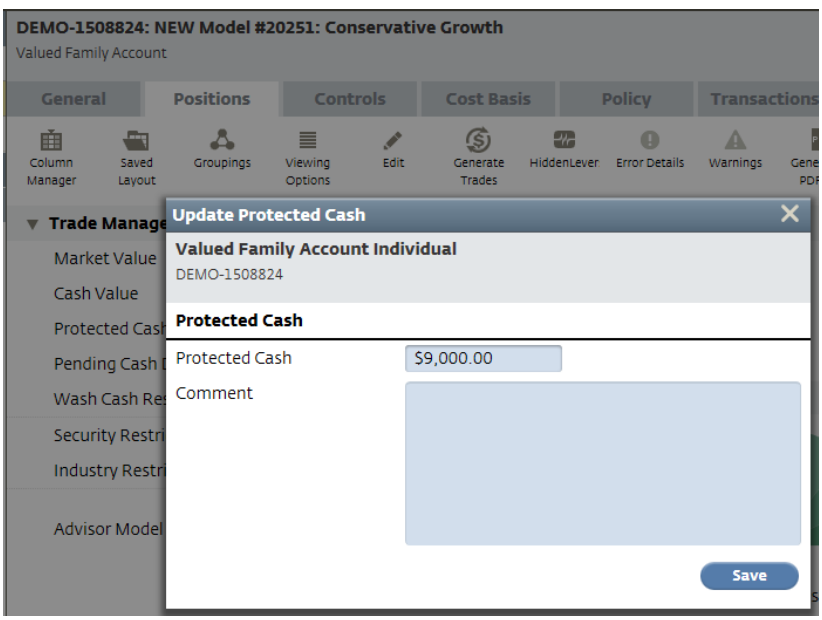
LIBERTYFI

CHEAT SHEET

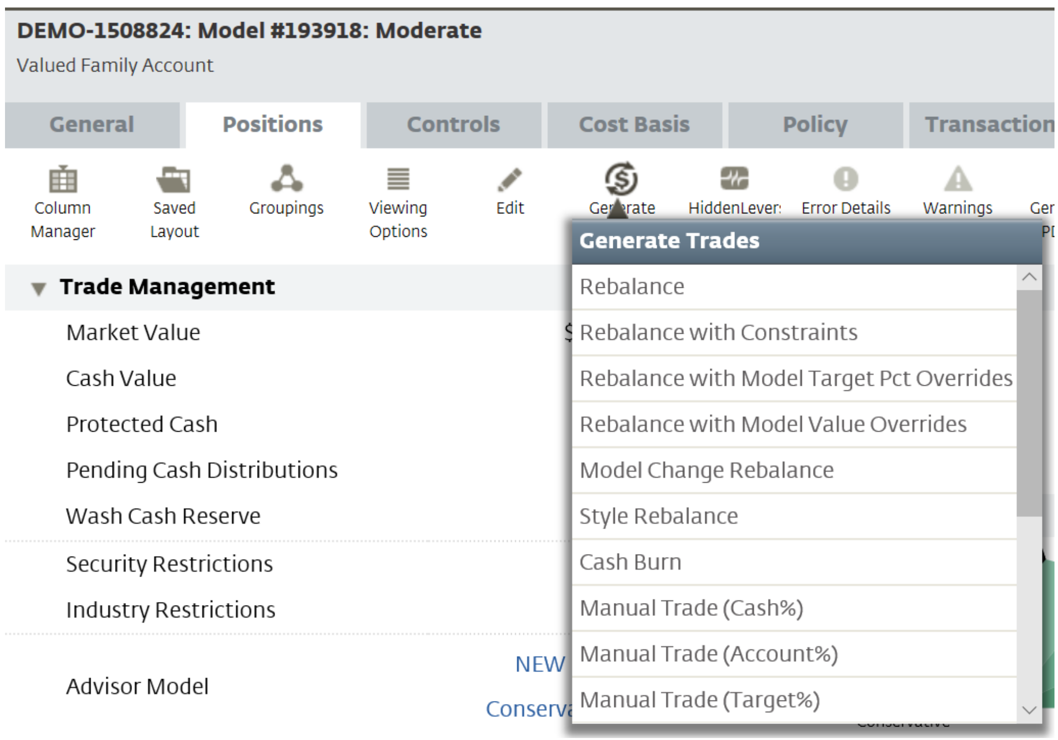
APM PROTECT CASH

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

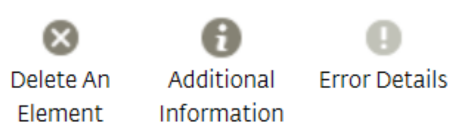
2. Navigate to the **Positions Tab** (account level)
   - Click on the **"Edit"** icon (pencil)
   - Enter the Protected Cash Amount
   - Click **Save**

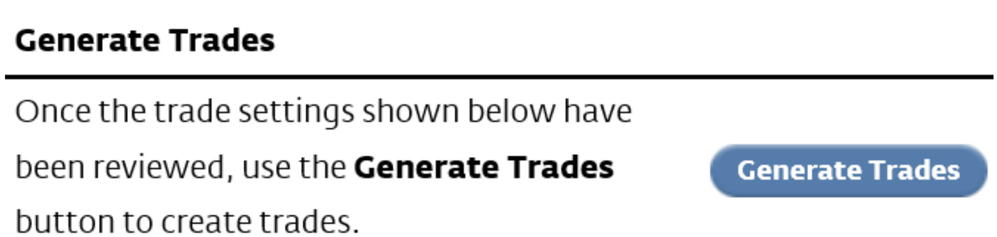


3. Rebalance: You must rebalance the account to raise the cash to the protected level
    - Click on the **Positions Tab**
    - Select the icon **“Generate Trades”**
    - Select **Rebalance**

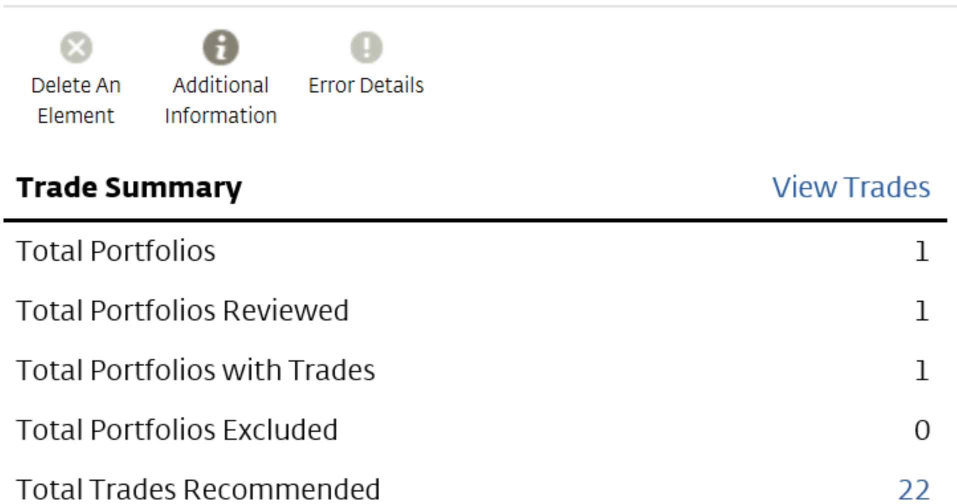


4. Generate Trades: Click **Generate Trades**





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



6. Trade Generation: Select **Manage Trades**, then click **Submit Trades**