Did you know that eSignature is available in Liberty? The eSignature feature allows you to send pre-filled forms to your client for an electronic signature. No printing. No scanning. The forms are emailed to TCA.

The forms are pre-filled using the new account data entered in the Liberty system. The documents are emailed to your client after confirming their identity and are then sent electronically to your office for review before sending to TCA.

Electronic signature makes it easier to obtain a signature when the client is not physically with you. It also speeds up the delivery to TCA, no manual intervention.

eSignature is available at no cost to you. To get setup contact your Relationship Manager. We will walk though your preferred workflow and brand the eSignature notifications (email, etc) with your logo.

Please let your relationship manager know if you have questions.