

**Account owners now have the ability to edit their Address and Phone Number on Liberty**



To further enhance your clients' Liberty experience, we are now providing the ability for account owners to edit their addresses and phone numbers on Liberty. This feature will be available effective May 21, 2021.

RIAs are no longer required to have owners sign physical forms to update this information. Although account owners have been able to update their email addresses on Liberty, they will now be able to edit their addresses and phone numbers in Liberty as well on the "About your account" screen.

As pictured below, selecting Edit will bring up a pop-up window where users can make edits. The option to edit addresses and phone numbers will not be available on certain account types, such as Joint and Corporations, where multiple users are required to sign off on changes; however, emails can still be edited under the Document Delivery Options section.

This new feature will provide the ability to edit individuals, such as individual owners or trustees, and the ability to edit entity addresses and phone numbers will be provided in a future update.

123456 - SAMPLE CLIENT - R/O Indiv. Retirement Account

<b>Overview*</b> <span>Active</span> Net Assets <b>\$304,132</b>	<b>Holdings</b> Securities <b>96%</b> Cash <b>4%</b>	<b>Performance</b> View performance and income	<b>Transactions</b> View transactions, actions and transfers	<b>About your account</b> Account Information, Documents & Settings
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<b>People</b>  INVESTOR <span>Edit</span> <b>SAMPLE CLIENT</b> 123 W. Sample St. Anytown, ST 12345 H:333-444-5555 B:777-888-9999 sampleemail@liberty.com  Tax ID: *****0000 Date of Birth: 03/08/1942	<ul style="list-style-type: none"><li>Statements</li><li>EFT Statements</li><li>Tax Documents</li><li>Document Delivery Options</li><li>Account Details</li><li>Required Minimum Distribution</li><li>Beneficiaries</li></ul>
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**Update Contact Information**

ELENORE BEYDA

*Physical Address (P.O. Box not allowed)*

123 W. Sample St.  
physical address line 2

City: Anytown State: Colorado  
Zip: 12345 Country: United States

*Mailing Address*  Same as Physical Address

123 W. Sample St.  
mailing address line 2

City: Anytown State: Colorado  
Zip: 12345 Country: United States

*Phone Number*

Home: (333) 444-5555    Business: (777) 888-9999    Mobile: (###) ###-####

*Email address*

sampleemail@liberty.com

Cancel Save

To access client-initiated updates, you can run the Address Change Detail report on Liberty.

We hope you find this new enhancement to Liberty useful. Please contact your Client Service Advocate with any questions or concerns. As always, your feedback is important to us. As you begin using these new features, please share your input with us.

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