

**CompleteView Users:
Enhanced Integration with
MoneyGuidePro**



Available on March 19!

For users of both the CompleteView feature in Liberty and MoneyGuidePro planning software, we have enhanced the statement family API integration to include accounts held away. As of 3/19/21, users of the MoneyGuidePro software can now choose to import the values for held away accounts that investors have connected.

Please contact your Client Service Advocate if you have questions about this integration.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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