

Ability to Create/Modify Systematics Now Available in Liberty

Systematics lets you define recurring distributions and/or contributions for the client account. Systematics may be added during the new account process or to an existing pending or active account. Systematics can only be edited when the systematic is in Suspended status. Once the systematic has been approved, it can no longer be edited in Liberty. All new distributions/contributions created initially reflect a Suspended status.

Please review the Liberty Office and Client Management User Guide (pages 42-43) to learn more about this feature.

For your ease of reference, all Liberty User Guides are now available at <http://riaconnection.trustamerica.com> under Quick Links to the right of our RIAconnection web page.

Please let your relationship manager know if you have questions or would like a demonstration of this or any Liberty features.