

EFT Notifications when in a Statement Family



Today, for non-statement families, Electronic Funds Transfer (EFT) notifications follow the statement delivery method elected by the account owner. If the statement eDelivery option is chosen, the account owner will receive an email notification that his or her EFT statement is available for review on Liberty. Similarly, if the paper statement option is chosen, the account owner will receive their EFT statement in the mail.

Effective May 2021, EFT notifications to account owners will follow the statement delivery method of the primary account owner in a statement family:

- When the primary account owner is set for statement **eDelivery**, the account owner(s) within the statement family will receive an email that their EFT statement is available for review on Liberty, provided we have a valid email address on file. If we do not have a valid email address, the EFT statement will be mailed to the address of record.
- When the primary account owner is set for **paper** statements the account owner(s) within the statement family will receive their EFT statement in the mail, regardless of the delivery method on the account.

As always, please contact your Client Service Advocate if you have any questions.

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

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