

Enhanced Liberty Features

Your feedback is important to us—thank you for providing!

To further enhance your Liberty experience, the following features are now available.

- In addition to information about Advisor Distribution Authority, there is now a section for Advisor Authorization for contributions in the About Your account screen as illustrated below:



- Liberty now displays the Account Details for pending accounts without subtypes; Liberty previously did not display this information if you did not have an account subtype selected.
- Addition of a new document category for Escheatment to Document Upload options on Liberty. Stay tuned for future details about this feature.
- We have updated the Liberty login process to validate passwords for complexity requirements—users will be required to make a password change for those that do not meet the minimum criteria.
- Account Status indicator has been added to Overview Tab in Liberty.



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Please let your Client Service Advocate know if you're interested in a demo of these features and/or of questions you may have.

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

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