

Form Digitization

Coming Soon

Something new is on the way....

Elevate your clients' experience and unlock operational efficiencies with intuitive technology within Liberty. In the coming months, we will release a series of digital forms that simplify:

- The form submission process for you and your clients
- Information validation in real-time to ensure accuracy and timeliness
- Notifications to clients of proposed updates with the ability to authorize requests

IRA Beneficiary Designation or Change Request – Coming Soon

With our new digital experience, you can add, remove, or update beneficiaries from one dynamic and secure location with real-time validation. Eliminating the need to download, print, or mail/email forms to clients.



Ensuring a current beneficiary is on file for all your clients' accounts leaves no doubt about where your clients want their money to go if something were to happen. Our digital experience makes this essential activity straightforward.

When the new form is ready for release, we will provide timely updates and resources to assist you. Access this modernized solution to boost your operational efficiencies and delight clients with an enhanced digital experience.

Questions? Please reach out to your Client Services Advocate.

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

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