

# Form Digitization

Now Available

Our next new digital form is here.

Elevate your client experience and streamline operational efficiencies with intuitive technology within Liberty. In the coming months, we will continue to 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 – Now Available

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.



The digital Beneficiary Form is accessible in Liberty on the Account Details Page under the Forms Section. For detailed instructions, please refer to our [Liberty Beneficiary Digital Form User Guide](#).

## Go Digital

Our Transfer In Form is also available through our new digital experience. This form was designed to streamline incoming ACATS-eligible in-kind or partial cash/in-kind transfer requests with the same ease and accuracy. If you haven't yet taken advantage of this, now is a great time to explore the benefits of our growing digital forms experience.

**Questions?** Please review our [Frequently Asked Questions](#) or reach out to your Client Service Advocate.

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

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