

TCA's Integration with Jefferson National now has a New Billing Feature!



The integration now enables advisors to pull their Jefferson National advisory fees from an account established at TCA. This new feature allows you to:

- Centralize billing reports
- Save time by utilizing TCA's fee calculation
- Choose whether to bill your client's JeffNat account on an Average Daily Balance (ADB), or Period/Month End methodology
- Avoid potential 1099s by pulling fees from an established taxable account at TCA
- Give clients ability to reach advisory fee thresholds with household billing report capabilities

TCA's integration and fee enhancement with JeffNat underscores our commitment to helping you deliver exceptional client service while also enhancing the efficiencies of running your business.

If you would like more information or are interested in setting up your fee schedules, please contact your TCA relationship manager or email us at JeffNatInfo@trustamerica.com.