

Service Team Update

New service enhancement when you call

At E*TRADE Advisor Services, we are continually looking for ways to improve our service to you. Part of that service is to ensure that the team supporting you and your business have the specialization and immediate availability you need.

As always, your Client Service Advocate (CSA) (formerly known as Relationship Manager) continues to provide fast and reliable service and quick resolutions to any issues that arise. Additionally, your CSA has a dedicated team as back-up support in case your point person is ever unavailable because of a meeting, sick day, vacation, etc.

Currently, when you call your dedicated CSA and he or she is not available, you are directly connected with a member of your CSA's team. Effective today, we have updated our phone system so that you have an additional choice: if your CSA or their direct team member is not available, you will be prompted to either have your call connected to yet another team member or be connected to your CSA's voicemail. We believe this added functionality will give you more options for the service experience you need.

Thanks for your continued support – we remain dedicated to the success of your business.

Let us know if you have any questions or concerns.