

Important updates from your Client Service team



We continue to monitor the global COVID-19 pandemic in order to effectively serve you and your clients while ensuring the safety of our employees. We wanted to share some important information and updates with you.

We encourage the use of electronic delivery

Instead of handling physical paperwork:

- Securely upload paperwork and forms using Liberty.
- Request funds via ACH or wire instead of check.
- Promote eDelivery to your clients. Clients can sign up for eDelivery right on Liberty.

If you have questions about how to electronically upload documents or help clients set up eDelivery, or are interested in learning about your account owners that have systematic distributions via check, please contact your Client Service Advocate.

Update on operational changes

We are excited to announce that we've returned back to our normal service-level expectations, including normal hours and support in our mail house. Please note:

- Overnight mail requests will return to the normal "Overnight" service.
- Our mail house is fully staffed and operating normal hours to support the business. Although there may be mail delivery delays by the USPS and other carrier services, we're committed to processing our incoming and outgoing mail as per our normal service-level expectations.
- Electronically sending documents will allow us to provide the most timely service.
- We encourage clients to retrieve statements on Liberty instead of waiting for the hard copy mailing as the USPS or other carrier services may continue to experience delays.

Please contact your Client Service Advocate if you have any questions or concerns about paperwork or your account management needs.

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