

Upcoming changes for Non ACATS Transfers



Effective July 31, we are implementing changes to make our Non ACATS transfer processing more efficient. For partial non ACATS transfer out requests that are in good order, we will process immediately, rather than rejecting back to you for your approval. Completed partial transfer out requests are captured in your Liberty Cash Withdrawal Bulletin.

In addition, if a full non ACATS transfer request is in good order, account is terminated and final fees taken, we will process it immediately, rather than rejecting it back to you. You have access to the completed case in your Liberty Message Center under closed cases should you need to review the paperwork.

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

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