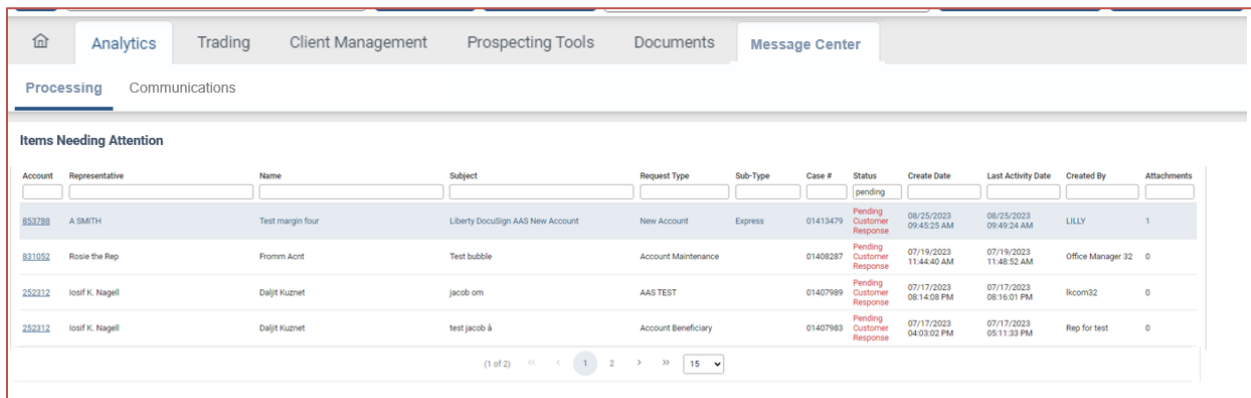


Liberty Message Center Enhancements

Live Friday, November 17!

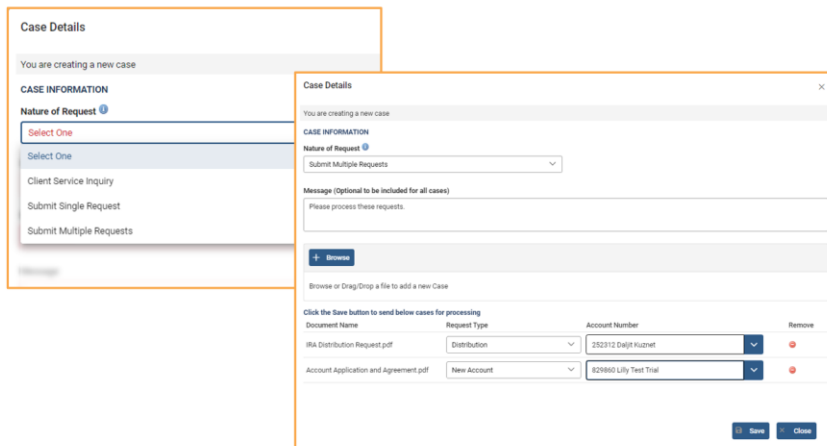
As previously communicated, we will be releasing some exciting new enhancements to the Message Center!

The Liberty Message Center will now have its own tab in Liberty to bring more attention to the requests for your firm, as well as sorting the items needing attention.



Account	Representative	Name	Subject	Request Type	Sub-Type	Case #	Status	Create Date	Last Activity Date	Created By	Attachments
853788	A SMITH	Test margin four	Liberty DocuSign AAS New Account	New Account	Express	01413479	Pending Customer Response	08/25/2023 09:45:25 AM	08/25/2023 09:49:24 AM	LILLY	1
831052	Rosie the Rep	Fromm Acct	Test bubble	Account Maintenance		01408287	Pending Customer Response	07/19/2023 11:44:40 AM	07/19/2023 11:48:52 AM	Office Manager 32	0
252312	Isaif K. Nagell	Daljit Kuznet	jacob om	AAS TEST		014407969	Pending Customer Response	07/17/2023 08:14:08 PM	07/17/2023 08:16:01 PM	lcom32	0
252312	Isaif K. Nagell	Daljit Kuznet	test jacob a	Account Beneficiary		014407963	Pending Customer Response	07/17/2023 04:03:02 PM	07/17/2023 05:11:33 PM	Rep for test	0

In addition, we are also streamlining how you can submit requests via the Message Center, allowing users to submit an inquiry/message to their Client Service Advocate, submit one request, or submit multiple requests.



Case Details

You are creating a new case

CASE INFORMATION

Nature of Request

Select One

- Client Service Inquiry
- Submit Single Request
- Submit Multiple Requests

Submit Multiple Requests

Message (Optional to be included for all cases)

Please process these requests.

+ Browse

Browse or Drag/Drop a file to add a new Case

Click the Save button to send below cases for processing

Document Name	Request Type	Account Number	Remove
IRA Distribution Request.pdf	Distribution	252312 Daljit Kuznet	Remove
Account Application and Agreement.pdf	New Account	829860 Lily Test Trial	Remove

Save Close

If you have any questions, please reach out to your Client Service Advocate for more information.

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