Straight-Thru Processing For One-Time ACH Contributions

Now Available in Liberty

We have made enhancements to Liberty to include the ability for one-time ACH contributions to be processed automatically if an Advisor Authorization is on file for the account. This enhancement streamlines the time and resources currently needed for additional processing paperwork.

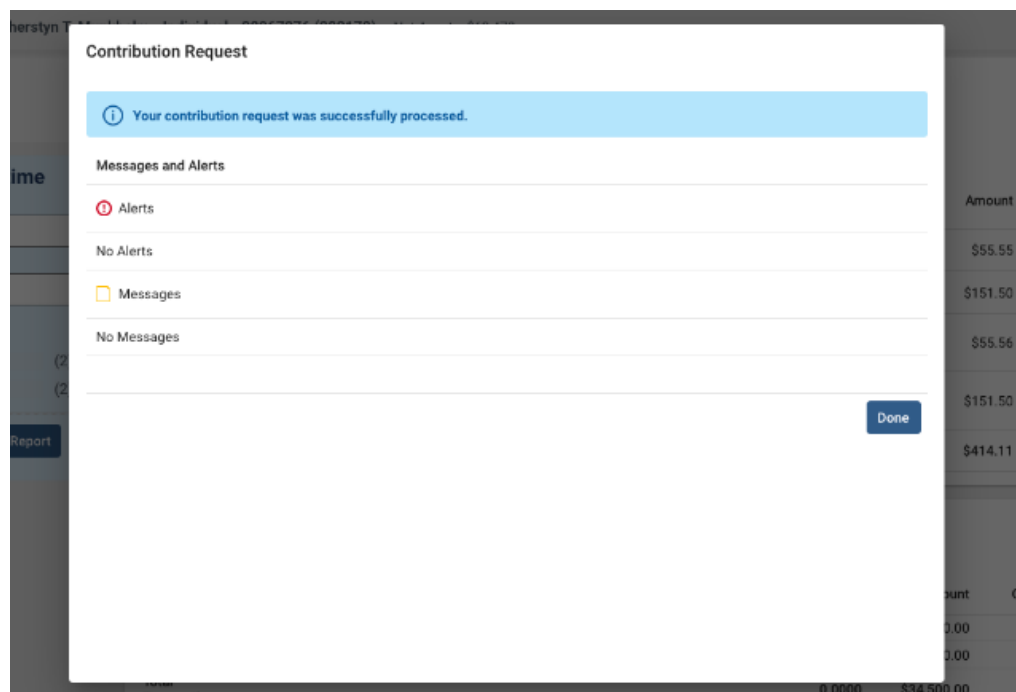**Account Types Eligible for Straight-Thru Processing**
- Individual
- Joint
- IRA
- Roth
- Trusts
- Minor Accounts

Employer-sponsored plans, rollover contributions, IRA conversions, and IRA/Roth recharacterizations require client instruction/signature and are not eligible to be automatically processed. For accounts that require signatures, the receipt of a signed ACH Deposit form will only be processed the same day if received prior to 12 pm MT.

Below are examples of successful and conditional submission representing what you will see in Liberty starting April 19th. Any accounts not eligible for straight-thru processing will be alerted to the user who is submitting the request.

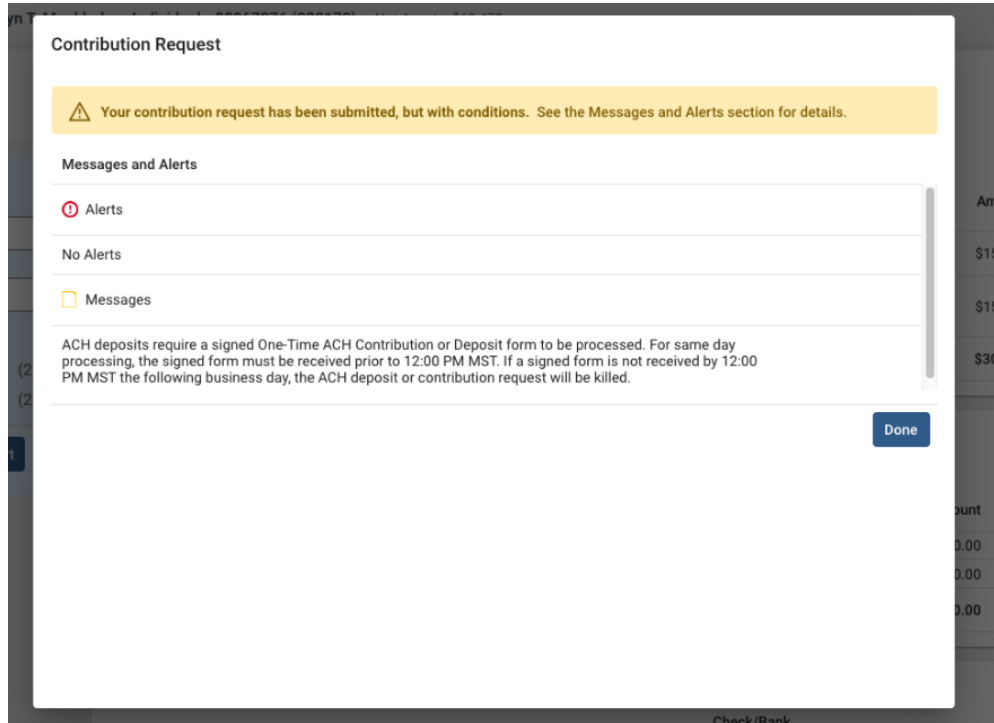If you have any questions, please contact your Client Service Advocate.

Successful Submission

Upon successful submission of a one-time ACH Contribution for an eligible account with Advisor Authorization on file, this screen will show confirmation of processing.

Please note that it may take up to approximately one hour for the transaction to appear with the account.

Account Requires Signed Forms