



**Coming mid-October:  
Send your account owner  
LOIs for address, email and  
phone number updates to  
E\*TRADE Advisor Services**

As the custodian for your clients' assets, protecting these assets from fraud is our number one priority. Therefore, we are taking additional steps to help protect client accounts whenever they update their contact information.

Currently, when you or your staff receive a Letter of Instruction (LOI) from an account owner to update a mailing address, email address, and/or phone number, you can make the updates directly in Liberty.

Effective mid-October 2020, you will no longer have the ability to change client contact information within Liberty. E\*TRADE Advisor Services will make these updates on your behalf. Going forward, you should send any account owners' signed LOIs for account updates to your Client Service Advocate or directly to our processing area at [tca-svc\\_docustar@etrade.com](mailto:tca-svc_docustar@etrade.com).

We are in the process of updating the Change of Address form to include the ability to provide a change of email address and phone number. Until the updated form is available online for use, we will accept LOIs from the account owner.

We believe this process change will further help protect the safety of your client' accounts and also help reduce your firm's liability. Please contact your Client Service Advocate with any questions or concerns.

Let your Client Service Advocate know of questions you may have.

The E\*TRADE Financial Corporation family of companies provides financial services, including trading, investing, investment advisory, RIA custody and banking products and services.