

Updated Liberty Account Creation User Guide

Setting up an account on Liberty is now easier than ever. Updated guide includes instructions and information around:

- Creating the account
- Copy Account
- Associating
 - o model allocations
 - o representatives
 - o beneficiaries
 - o fee schedules
 - o contribution and distribution systematics
 - o statement families
 - o copying an existing account
 - o Interested Party

Additionally, you can create account opening paperwork in the Forms screen which can then be viewed and printed for client signature. If enabled, use eSignature to send your forms out for signature.

Please review the: [Liberty Account Creation User Guide](#)

Contact your relationship manager for a demonstration and with any questions you have.