

TCA Partners with Morningstar: Asset and Subasset Classification Now Available



Trust Company of America has partnered with Morningstar to provide a monthly feed of asset and subasset class information for equity, ETF and mutual fund securities that are offered through TCA. This feature is available November 5, 2016 and will be used as default asset and subasset class information.

You, the investment advisor, will continue to have the ability to request your own asset and subasset classes. However, Morningstar information will be used whenever asset and subasset classes have not been customized.

Asset and subasset class information will be displayed in several places on Liberty, including the Lookup Security screen and the Holdings tab for an individual.

To learn more about this feature, please review the Liberty Asset and Subasset class from Morningstar Product Overview.

If you have questions or would like a demonstration, please contact your relationship manager.