

Liberty Self-Service Fee Schedules

Now Available

Liberty now supports self-service fee schedules.

We have made enhancements to the Client Management page in Liberty to include a new function where fee schedules can be created and edited.

Previously, making updates or adding new fee schedules would have required you to reach out to your Client Service Advocate. This new feature will provide you the autonomy of setting up new fee schedules and the ability to edit existing ones. Utilizing this feature will give you instantaneous fee schedule changes for streamlined operations. The self-service fee schedule feature is available in Liberty at no additional cost and with no additional paperwork.

If you have any questions about the self-service fee schedule feature in Liberty, please reference the Liberty Office & Client Management Guide or contact your Client Service Advocate.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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