Enhanced self-servicing of systematic distributions and contributions

Beginning Friday, March 29, you will have the ability to edit systematic distributions and contributions when an active Advisor Authorization is on file. This will allow for a more efficient and timely opportunity for you in meeting your clients' cash needs.

Modifiable fields on the Account Details tab in Liberty include:

- Changing the amount of the systematic: You can change the amount to any dollar value
- Frequency: You can now change the frequency to other options
- Changing the date of the systematic: You can select any day beyond seven days
- Suspend the systematic: You can suspend the systematic until any future date by selecting any date in the future
- Canceling a future distribution or contribution event: Cancel the systematic at the click of a check-box for all future occurrences
- Editing the withholding amounts for active systematics distributions on Liberty

The ability to edit is only allowed if the systematic has not already been initiated. You will receive a message indicating inability to edit if the systematic is already in the pre-process phase. Additionally, you are unable to change or add new bank information.

Coming in Q2 2019:

- Editing where the systematic is being sent: You will be able to change to another already established bank or direct the payment to be sent to the address of record

- Adjusting for state-specific restrictions for withholding

Your relationship manager is available to provide a demonstration of these features and answer any questions you may have.