Account Applications and New Data Fields Now Available on Liberty

The newly rebranded TCA by E*TRADE account applications will be available on Liberty starting on August 31, 2018. These applications will be pre-populated with shell account data for you to present to account owners for execution. These applications also have eSignature functionality.

Prior to this update, these account applications have only been available on the TCA by E*TRADE website and in LaserApp.

The rebranded account applications that will be available on Liberty include:

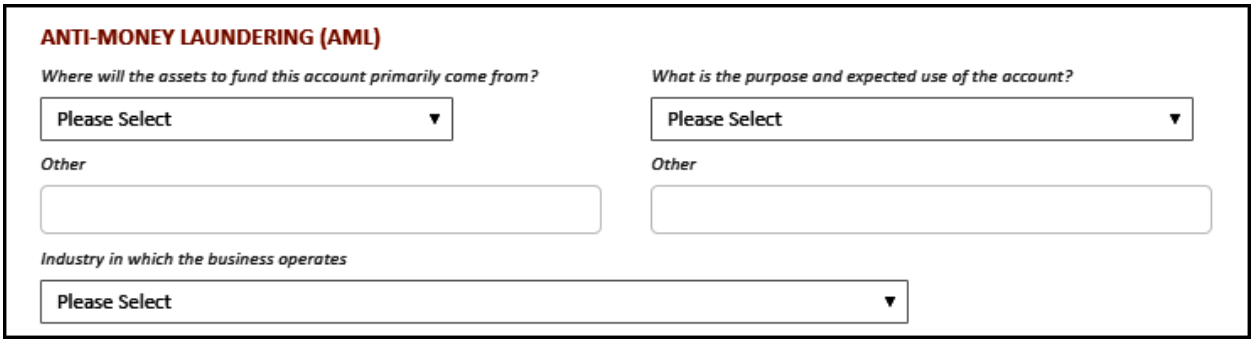
- Non-Qualified Account application
- Retirement Account application
- Qualified Plan application
- Trust Account application
- Business Account application

Of course, the overall process and flow for opening accounts remains the same. You will just be using the rebranded applications.

Changes you'll see on Liberty

New Anti–Money Laundering Fields

Account applications (Section 2) will now pre-populate with the government-required Anti–Money Laundering (AML) questions. You will be able to see the new AML questions, which are at the bottom of Liberty's Registration Steps in the Account Details section:



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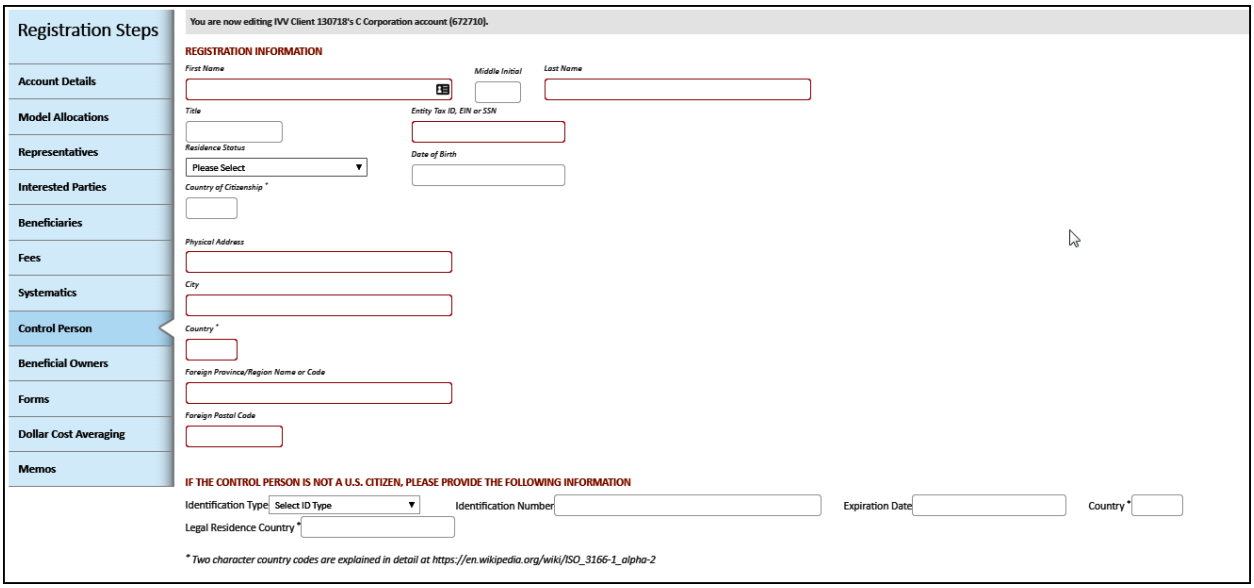
***** Coming in September - Control Person and Beneficial Owners *****

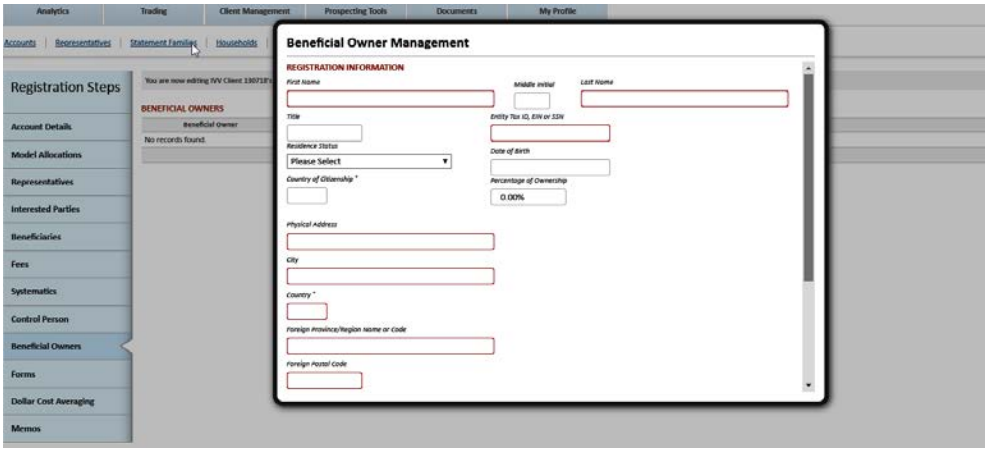
For Trust accounts and Business accounts, Liberty will have tabs under Registration Steps referencing the Control Person and Beneficial Owners. These sections will only appear for the applicable account types.

The Trust Account application (Section 5) and Business Account application (Section 3) will pre-populate the Control Person and Beneficial Owners, as long as data fields are completed on Liberty.

Control Person



Beneficial Owners



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If you have questions or would like a demonstration to learn more about these new features, please contact your TCA by E*TRADE Relationship Manager.