Add more value to client relationships with account aggregation

To be at the center of your clients' wealth management teams, you need to provide holistic planning guidance. To do that effectively, you need a complete view of all your clients' finances. That's why account aggregation can be such a valuable tool.

Now you can access a new account aggregation tool right in Liberty that's easy to use for you and your clients—and at no additional cost for TCA by E*TRADE account holders.

Introducing CompleteView, from TCA by E*TRADE, a free aggregation feature that helps you:

- Enhance the quality of your client offering
- Provide better guidance and decision-making
- Gather new assets that are currently held-away
- Spot opportunities to provide additional products or services

Fully integrated on the Liberty platform, CompleteView offers:

- Extensive coverage with links to more than 14,000 institutions
- Quick and easy account linking
- Personal financial management apps that can help drive client engagement
- Comprehensive views that can be accessed online or built into reports

Best yet, CompleteView is a built-in feature on the Liberty platform, helping you avoid the extra work and cost of an add-on aggregation tool.

To learn more, contact your Relationship Manager, email learnmore@trustamerica.com or call 800-955-7808.