

COMING SOON!

No More Statement CDs – Hello Zipped File in Liberty Completed Outputs with PDFs of your Quarterly Statements!



Effective Q3 2017, TCA offers a more secure, timely and convenient way for you to review, retrieve and store client statements. Rather than our mailing a CD, a zipped file containing your client statements will be available in Liberty Completed Outputs.

Benefits of delivering your statements via Completed Outputs:

- **Secure:** Rather than mailing a CD that stores the individual statements, a zipped file of such will be delivered to your Liberty Report Outputs eliminating potential loss of CD, delayed delivery and/or interception by others. Only those that have RIA Liberty logins have access.
- **Timely:** Rather than waiting for the CD to arrive in the mail, as soon as TCA places your zipped file in Liberty Completed Outputs, you and others within your office have immediate access to review. You have access before or as TCA prints and mails to account owners.
- **Flexibility of Storage Methods:** Once you open the file, you can store using a method of your choosing – client files, office files, rep files, etc. You can even download to a CD if you wish. To avoid clogging your Completed Outputs, TCA will remove the file after 30 days. In the event you need to retrieve statement files for a previous quarter, in a previous year, in the prior decade, let your relationship manager know and we'll place in Liberty Completed Outputs.
- **Easy to access:** You can review your statements before we print and mail, multiple people in your office can view at the same time and all with a click of a mouse!

Your relationship manager will be reaching out to you very soon to share this new feature.