

Reminder - Former Trust Company of America branded forms will no longer be accepted Effective January 1, 2019



In April 2018, all TCA forms were rebranded to reflect our new TCA by E*TRADE brand. Additionally, in September 2018, the newly updated account applications reflecting our new brand were made available for pre-populated download on Liberty.

Effective January 1, 2019, TCA by E*TRADE will no longer accept prior versions of account forms—only current versions of the TCA by E*TRADE forms will be accepted.

Also, effective January 1, 2019, the AML Client Information must accompany older versions of the TCA by E*TRADE applications. If older versions of account applications are received, your relationship manager will reach out to you for the needed AML client information. As the RIA, you may provide the information via email or provide the applicable supplemental form. Upon receipt of the AML client information, and provided the remainder of the application is in good order, the account will be opened.

You can access the applicable AML Client Information forms: [AML Client Information for a Trust Account](#), [AML Client Information for a Business Account](#), [AML Client Information for a non-Qualified, Qualified Plan or Retirement Account](#).

NOTE: Please make sure to delete and replace prior versions of the forms posted on your website or being used by your staff or representatives.

If you need access to any of our new forms, they can be found in multiple locations:

- Website. Go to www.trustamerica.com/advisor-forms
- Liberty. Pre-populated forms available for download
- Laser App. Fillable versions of our forms available

As always, please contact your Relationship Manager with any questions regarding forms.

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