

**Coming Soon - You now can update account owner address, email address and phone number on Liberty**



**\*\*\*Thank you for your feedback\*\*\***

Beginning September 24, we are reinstating your ability and that of your representatives, to update account owner address, email and phone number on Liberty.

Account owners have had the ability, for some time, to update their email address on Liberty. Earlier this year, we extended the ability for account owners to edit their addresses and phone numbers on Liberty. These features will continue.

Also, effective September 24, a daily bulletin will be presented on Liberty whenever the RIA, Representative or account owner updates the address or email on Liberty. This will ensure alignment of such updates with applicable parties.

The following additional updates will also be seen on Liberty effective September 24, 2021

- By default, available Cash will be presented on the first line on the Holdings tables and not embedded in the middle of invested list of positions
- Also, by default, below the available cash in the Holdings, positions will be sorted from largest allocation to smallest – you'll no longer need to click the % of Total Holdings column twice to sort by largest to smallest.

We are truly committed to listening to your feedback and working to enhance Liberty!

Please reach out to your Client Service Advocate with questions or a demonstration of these enhanced features.

**Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

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