Liberty enhancement designed to capture more investor details

Dear valued partner,

We are continuously looking for ways to improve our service to you, including making your account opening process easier and more thorough. To that end, we are enhancing the Account Details section in Liberty to allow advisors and their clients to provide additional investor information during the account opening process. This will enable you to capture important investor information in Liberty that was previously not available.

The updated Account Details section will be available beginning May 4, 2020.

For more complete details of the Liberty enhancement, download the information here.

For a helpful demonstration of the changes, you can also watch this pre-recorded webinar.

As always, we appreciate your business—it's a privilege to service you. If you have any questions or concerns, please contact your E*TRADE Advisor Services Relationship Manager.

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