

# Opt-In for eDelivery Statements

Trust Company of America's investor site, Liberty, allows you to elect electronic delivery of statements. eStatements enable you to replace printed and mailed account statements with a more secure, convenient, and responsible electronic delivery alternative by accessing statements in Liberty. Account owners who elect eStatements will receive email notifications when statements are available for viewing in Liberty. eStatements are provided in a safe and secure PDF format.

## First Time User

<https://www.trustamerica.com/liberty/desktop/>

Use your six-digit account number as your login and nine-digit Social Security or tax identification number (with no dashes) as the initial password. You will then be prompted to change your password. An acceptable password will use at least 5 characters and no more than 14 characters and should include special characters, numbers and letters to achieve a strength rating of Medium or higher.

## Using Our Smartphone App

After logging onto Liberty and establishing a new password, you can download our App which is available on both Apple's App Store and Android's Google Play store. Simply search "Anchor Financial Group" and our App will be towards the top of the results. Use the same 6-digit account number and your NEW password that was created on the website.

## Electing eStatements in Liberty

Once logged into your account, select the "About Your Account" tab

1. Select the row titled "Document Delivery Options"
2. Verify the email address in the row titled "Email" – if correct, skip to #5
3. To add OR change the email address – select "Edit" button – pencil icon – left of screen
4. In the "E-mail" row input the desired e-mail address into the "Enter" field and save
5. To change the delivery type for statements, select "Edit" if it has not been selected
6. In the "Delivery Methods" row select the button for either "E-mail"(eStatements) or "Standard Mail"
7. Read and agree to the "Document Delivery Terms of Agreement"
8. Select the "Save" button to activate the changes
9. The information under the "Document Delivery Options" row should now reflect the Changes

## eStatements for Statement Families

For the primary account owner in a statement family, a consolidated eStatement is provided on Liberty. For non-primary account owners, an informational statement is provided.

While primary account owners in a statement family can elect to receive their consolidated statements through Liberty, non-primary account owners do not have the ability to select delivery options (informational statements are only available through Liberty and are not mailed). If the non-primary account owner is removed from a statement family, or if they are changed to the primary account owner of a statement family, then they can elect their own statement delivery preference.