




The Legent Cash Plus Account comes with a host of features that enables your clients to consolidate their investment and banking activity into one account. Clients can select from a wide variety of cash sweep vehicles including an FDIC insured account with asset protection up to \$3 million as well as a full menu of money market funds offering competitive yields.

In addition, the LCPA offers the convenience of full banking services including checking, a choice of a Visa® Gold or Platinum ATM/Debit card with extensive Visa-provided protection and privileges, and direct deposit and ACH (electronic funds transfer) capabilities.

All investment activity and banking transactions are displayed on your clients' brokerage account statements which also provide tax-lot, cost basis reporting.

Clients can use their debit card for ATM withdrawals or purchases worldwide wherever the Visa® card is accepted.

FEATURE	LCPA Standard	LCPA Premium
FDIC Insured Deposit Program*	✓	✓
Comprehensive Tax-lot Statement	✓	✓
Free Initial Order of Standard Checks	✓	✓
• Payee Enhancement	✓	✓
• Expense Coding	✓	✓
Visa® ATM/Debit Card	Gold	Platinum
• Warranty Manager Service	✓	✓
• Purchase Security	✓	✓
• 24 Hour Auto Rental Collision Damage Waiver	✓	✓
• Auto Rental Discount Through Avis	✓	✓
• Visa Roadside Dispatch	✓	✓
• Travel and Emergency Assistance Service	✓	✓
• Worldwide Automatic Travel Accident Insurance	✓	✓
• Lost Luggage Reimbursement		✓
• Emergency Evacuation Insurance and Travel Coverage		✓
• Visa® Concierge Service		✓

*Refer to Terms and Conditions of Insured Deposit Program for details of coverage provided.



Check payee name, number, expense code, and amount will appear on the brokerage statement

For more information please contact us:

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