

Axos Client Portal

Any Device, Anytime



Help elevate your client experience with intuitive technology through the Axos Client Portal.

About the Portal

The Axos Client Portal (ACP) provides your clients with an enhanced digital experience where they can view and manage their investment accounts. Clients will automatically see all their managed accounts and will have access to Axos premier banking and lending solutions, letting you address your client's needs holistically.

What functionality is included in the Axos Client Portal?

- Portfolio Balance Chart
- Portfolio Model Breakdown
- Transactions
- Cash Holdings
- Digital Statements
- Account Overview
- Advisor Contact Info
- Account Aggregation
- Spending Categorization
- **NEW** Integrated Cash Management
 - Money Movement with Investor Checking
 - Securities-Backed Line of Credit
- **NEW** Contributions to Accounts
- **NEW** Native Mobile Application
 - Mobile Deposit
 - FaceID
- **NEW** Self-Service Password Reset

Create a Great Onboarding Experience

To create a great onboarding experience for your clients, we recommend reviewing your client information in Liberty to ensure it is up to date. We recommend that an email address and mobile phone be on file for the portal registration process. To help ensure your clients can easily register for the portal, please confirm the information in your CRM is mapping correctly to the information fields within Liberty. Providing this important information ensures that your clients can easily register for the portal.

Helpful Resources

To help prepare for your firm, we invite you to review some helpful resources in the Quick Links Section on the right side of your browser on RIA Connection.

If you have any questions, please reach out to your Client Services Advocate.

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

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