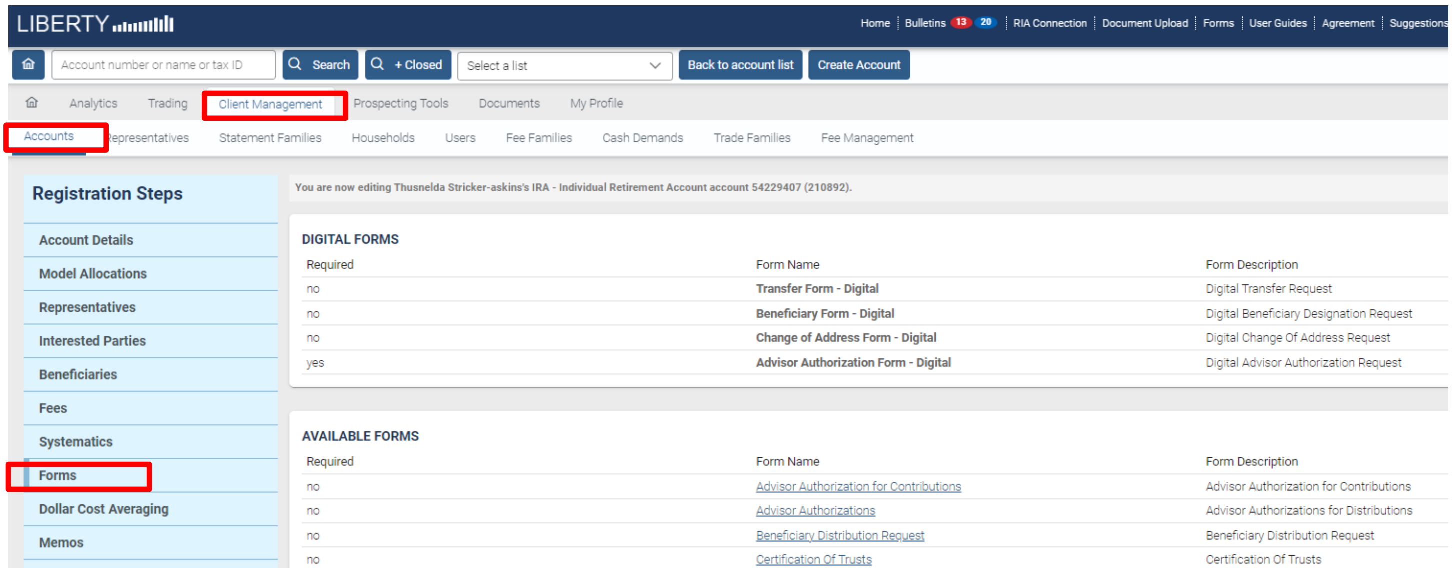
Advisor Authorization Form

Digital Experience User Guide

Liberty

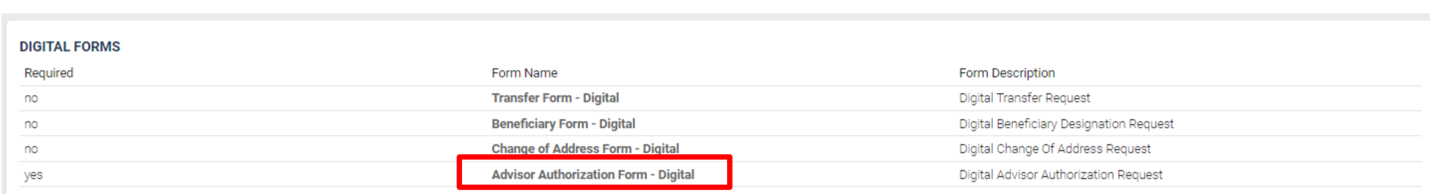
The digital **Advisor Authorization Form** allows Axos Advisor Services to accept specific contribution and distribution instructions submitted by the Advisor on behalf of end clients, without requiring the client's signature. The digital form can be accessed via Liberty in the Client Management Tab, under the Account Details Page in the Forms Section.



Digital Forms

In the Digital Forms section, click on the link under Form Name to launch the digital form experience.

The digital Advisor Authorization form will launch in a new window.

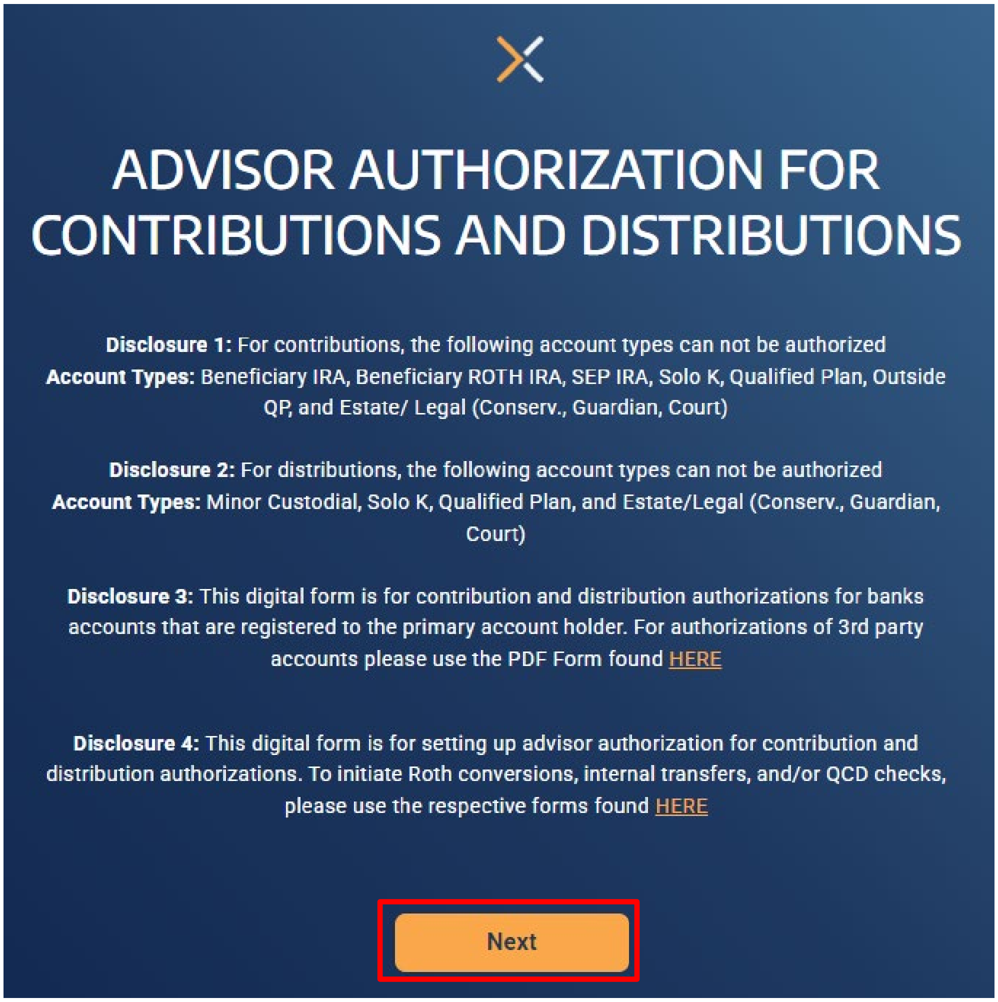


Digital Form Experience

Email Address Requirement: Ensure the account's email address is accurate and up to date. If changes are needed, update the email address on the Account Details Page in Liberty. Please allow 24 hours for processing before submitting the form.

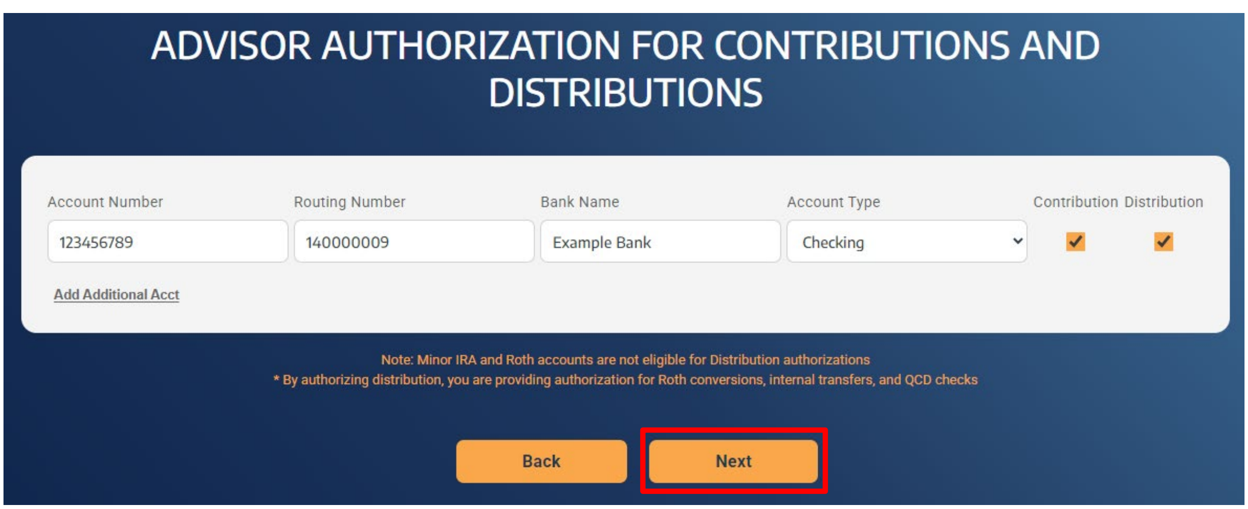
Review all disclosures associated with the form to ensure a smooth experience and clarity on expectations.

If the account falls under the specific disclosures provided, please select "Next."



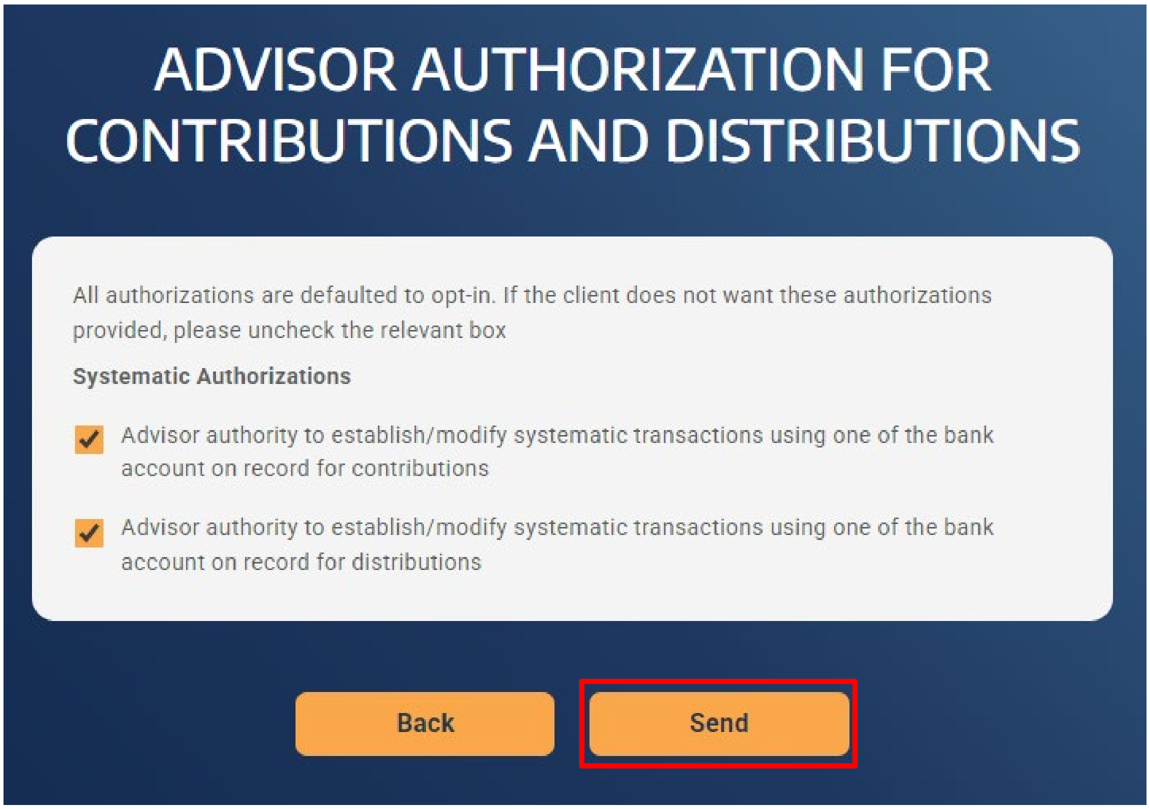
Section 1: Bank Account Information

- Enter the **Bank Account Number**, **Routing Number**, **Bank Name**, and **Account Type** for transactions.
- The **Contribution** and **Distribution** checkboxes will be pre-selected. Uncheck these boxes to exclude either transaction type.
- To authorize multiple accounts, click **"Add Additional Account."**
- When ready, click **"Next."**



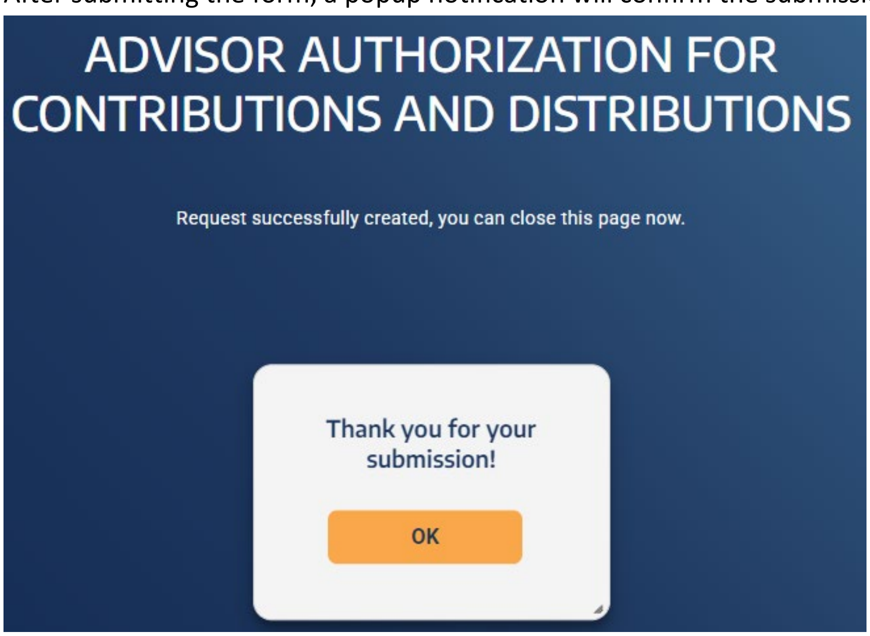
Section 2: Systematic Authorizations

- This section is automatically checked to grant authorization for **systematic contributions and distributions**.
- To limit the authorization to one-time distributions only, uncheck the boxes.
- Click **"Send"** to submit the authorization changes.



Submission Confirmation

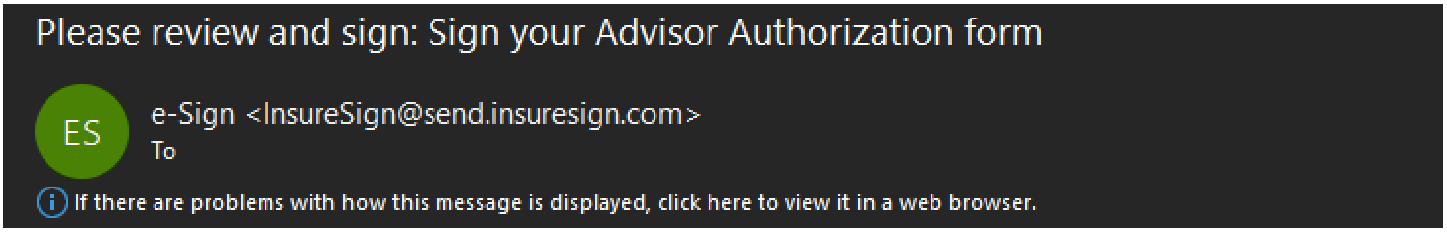
After submitting the form, a popup notification will confirm the submission is complete.

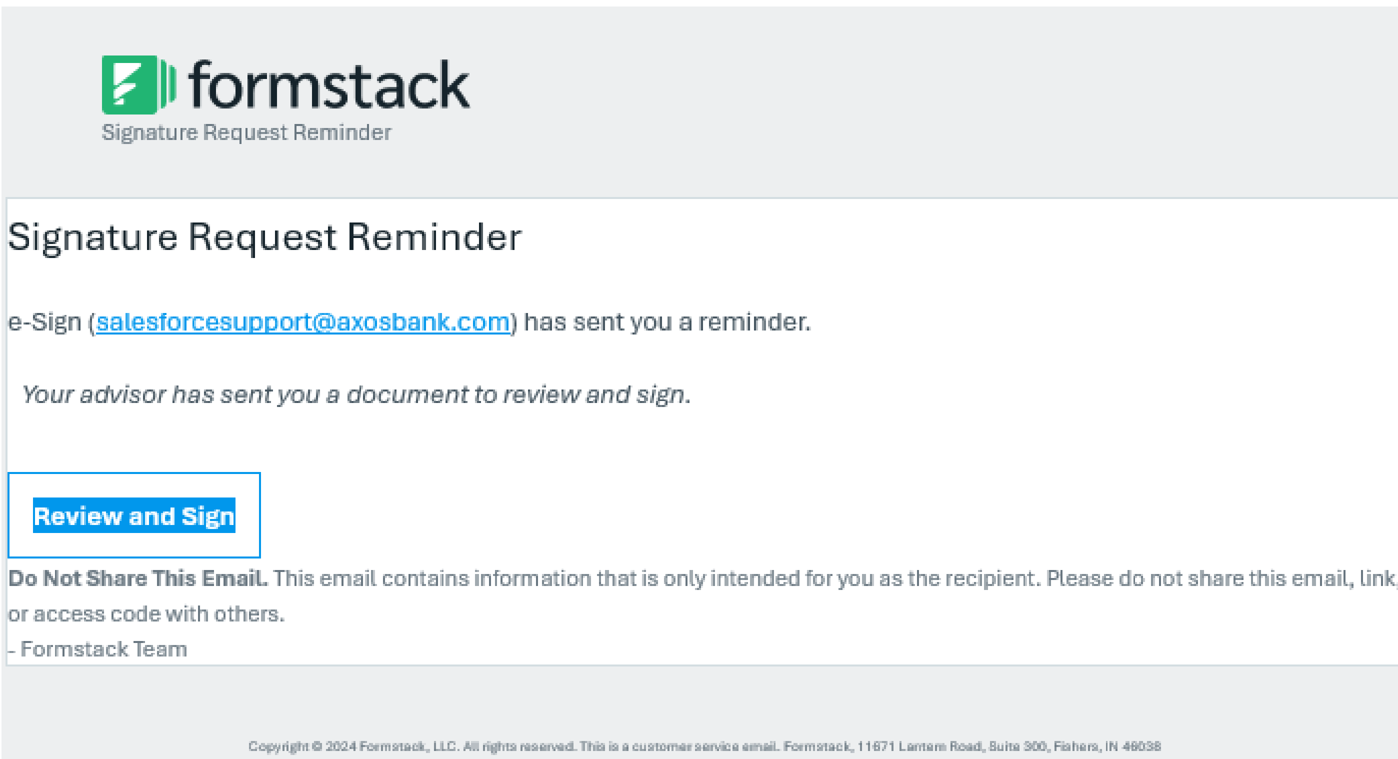


End Investor Communication

After the form is completed, your client will receive a notification email from **InsureSign@send.insuresign.com** prompting them to review and sign the Advisor Authorization form.

- To ensure timely delivery, encourage your client to add **InsureSign@send.insuresign.com** to their email address book as a safe sender, helping avoid potential filtering by their email provider.





Advisor Authorization Status

- Updates may take up to **48 hours** from the receipt of an in-good-order submission.
- You can monitor the status in Liberty as an **"Account Maintenance"** case within the **Message Center**.
- Once the changes are processed, they will also be reflected in the **'Account Detail' tile** on the account page.

Liberty Message Center

ACCOUNT CASES

Viewing 41 of 41 results

Preserve filters on refresh | Refresh | Export data | Create

Case #	Status	Request Type	Last Activity Date
01476766	New	Advisor Authorization	01/27/2025 07:46:48 PM
01476650	New	Advisor Authorization	01/24/2025 03:46:05 PM
01469372	New	Account Maintenance	11/15/2024 09:56:48 AM
01469148	New	Account Maintenance	11/15/2024 09:46:57 AM
01469146	New	Account Maintenance	11/13/2024 01:33:52 PM

(1 of 9) « ‹ 1 2 3 4 5 › » 5

Case Details

You are viewing case # 01476766 (created by Liberty - Formstack) Go to Message Center

CASE INFORMATION

Nature of Request

Single Request

Request Type

Advisor Authorization

Account Number

210574 Sherry Newman

Message

Description	Create Date
No records found.	

Add Message

ATTACHMENTS

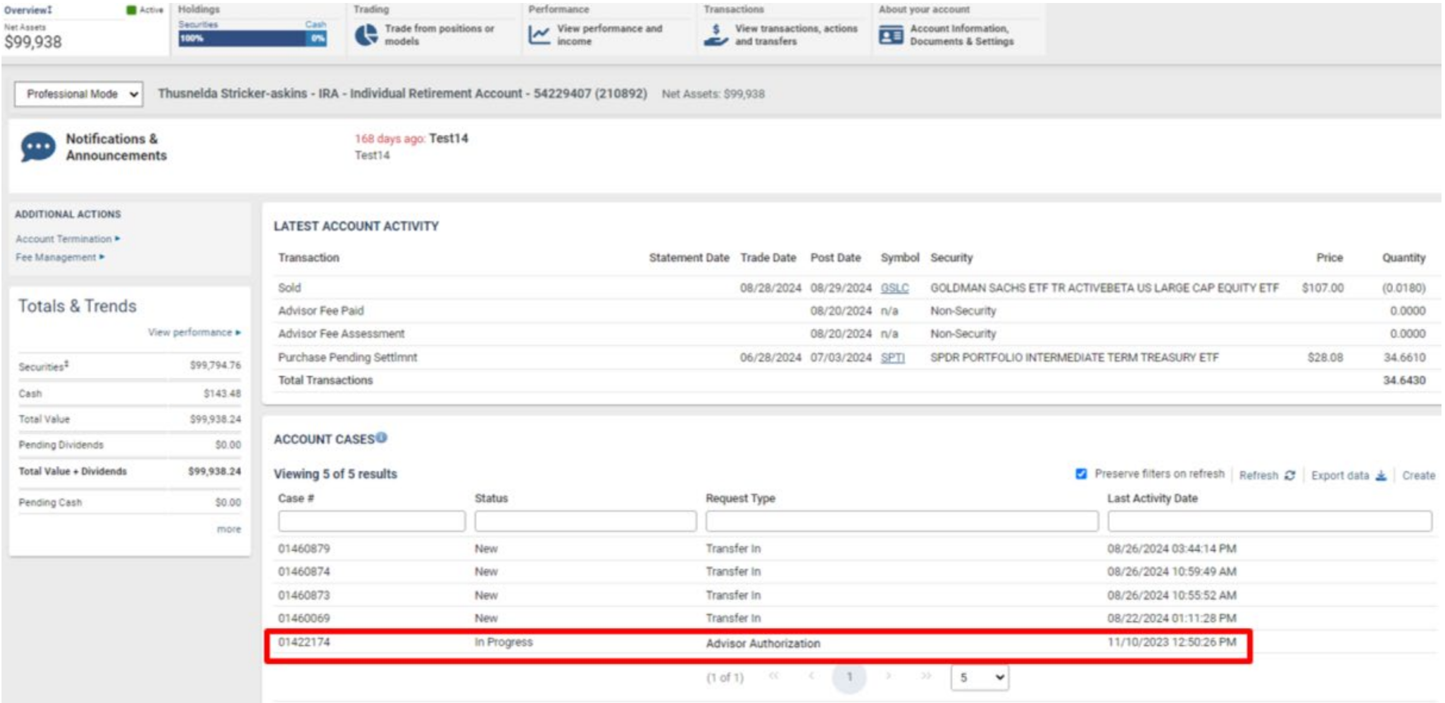
Sign your Advisor authorization form.pdf

ADD ATTACHMENT(S)

+ Browse

Browse or Drag/Drop a file to attach it to the Case

Account Page



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