

Axos Client Portal

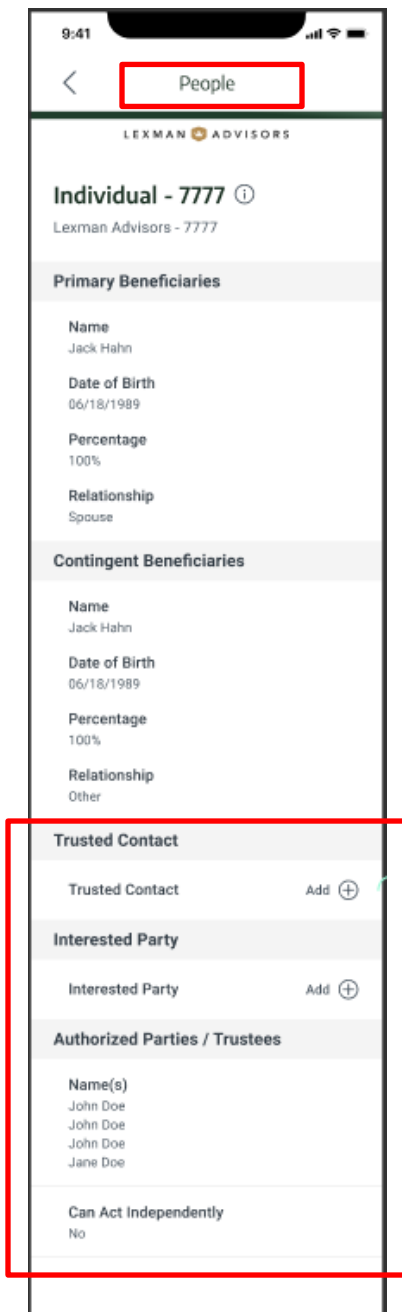
Trusted Contacts and Interested Parties

We have made some additional enhancements to the Axos Client Portal.

Your clients will now be able to add and edit Trusted Contacts (spouses, children, etc.) and Interested parties (CPAs) to receive statements and tax forms within the Portal. Your clients will be prompted to contact you if they would like to remove a trusted contact or interested party from their account.

View, Add, Edit, or Remove Trusted Contacts

This functionality can be viewed and initiated from the People tab within the Portal.



Trusted Contacts

Add Spouses, children, etc.

9:41

People

LEXMAN ADVISORS

Add Trusted Contact

First Name

Last Name

Suffix (optional) ▾

Relationship ▾

Mobile Phone Number

Email Address

Save

9:41

People

LEXMAN ADVISORS

Edit Trusted Contact

First Name
Kevin

Last Name
Tran

Suffix (optional) ▾

Relationship
Other ▾

Mobile Phone Number
(858) 888-8888

Email Address
ktran@email.com

Save

Remove Trusted Contacts

9:41

People

LEXMAN ADVISORS

Edit Trusted Contact

First Name
Kevin

Remove Trusted Contact?

You are about to remove your trusted contact. Do you want to continue?

Yes, Remove

No, Keep

Email Address
ktran@email.com

Next

Next

Interested Parties

Add Certified Public Accountants

9:41

People

LEXMAN ADVISORS

Add Interested Party

Name

Street Address

Apt / Unit (optional)

Zip Code

City

State ▾

Documents Received ▾

Save

9:41

People

LEXMAN ADVISORS

Edit Interested Party

Name
Bruce Stump

Street Address
345 Broadway

Apt / Unit (optional)

Zip Code
92103

City
San Diego

State
California ▾

Documents Received
Statements X Tax Forms X ▾

Save

Remove Interested Party

9:41

People

LEXMAN ADVISORS

Edit Interested Party

Name
Bruce Stump

Please Contact Your Advisor

Action is required by your advisor to remove interested parties.

Close

State
California ▾

Documents Received
Statements X Tax Forms X ▾

Next

Remove Trusted Contacts

If your client would like to remove a Trusted Contact or Interested Party from their account, they will be prompted to contact you and submit a letter of instruction requesting the removal.

To Remove Trusted Contacts

1. Send the client's Letter of Instruction for the removal
2. Submit via Liberty Message Center or email to your Client Service Advocate
3. Once the contact or interested party has been removed, the case will be closed via Liberty Message Center, or your Client Service Advocate will reach out directly.

Questions? Please reach out to your Client Service Advocate.

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

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