

Axos Elite Bundle | Your Client's Communication Experience

Click the icons below to see communication samples

Axos Elite Bundle Email Marketing

End Investors who do not have a Cash Management Checking account



Clicks Marketing Tile



Email 1



Email 2



Email 3

Investor Savings Email Marketing

End Investors who have a Cash Management Checking account



Clicks Marketing Tile



Email 1



Email 2

Abandoned Application Emails

End Investors who started a Cash Management Checking or Axos Elite application



Presented with Marketing Tile or Banner Reminder



Email 1



Email 2

Account Not Funded Emails

End Investors who have an unfunded CMC or Axos Elite account



Presented with Marketing Tile or Banner Reminder



Email 1



Email 2

Marketing Tiles and Banners

Samples of marketing tiles and banners that your clients could see within the portal



Marketing Tile Samples

Disclosures

Axos Elite Bundle | Your Client's Communication Experience


Axos Elite Marketing Experience

Email 1 | Your client will receive this email four days after clicking the marketing tile.

axos

Simplify Transfers and Maximize Earned Interest

Open Axos Elite for effortless transfers to your advisor-managed account. Crafted to align with your advisor's strategy for your financial future.



[Open My Accounts](#)

Here's what you'll enjoy:

- Faster Direct Deposits**
Access your money up to 2 days early.¹
- Unified Banking**
Checking, savings, and investments all in one place.
- Seamless Transfers**
Move money between accounts with ease.
- 24/7 Digital Access**
Securely bank anytime via online or mobile platforms.


Don't miss out on this limited time opportunity to earn up to **4.66% APY***. Pair your Cash Management Checking and Investor Savings accounts to access the Axos Elite Benefits.

Up to 4.66% APY* Savings	0.51% APY* Checking
------------------------------------	-------------------------------

Email 2 | Your client will receive this email if they haven't started an application within 15 days of receiving the first email.

axos

Elite Banking = High Interest Rates + Convenience



[Open My Accounts](#)

Join Axos Elite to easily transfer funds to your investment account managed by your financial advisor with convenient access, while also earning a competitive up to **4.66% APY*** on your savings!

Here's how you can start earning:

Qualifying Direct Deposit Add a monthly direct deposit of \$1,500 and maintain an average daily balance over \$1,500 in your Cash Management Checking account.	OR	Qualifying Deposit Deposit \$5,000 monthly and maintain a daily average balance over \$5,000 in your Cash Management Checking account.
--	-----------	--

Plus, elevate your checking account with:


0.51% APY* Earn more on your balance.	Faster Access Get direct deposits up to 2 days early. ¹
---	--

Pairing your accounts will simplify your finances, provide seamless transfers, and maximize your earnings.

Email 3 | Your client will receive this email if they haven't started an application within 15 days of receiving the second email.

axos

Elite Banking = High Interest Savings + Streamlined Cash Management Checking



Get more out of your bank accounts with easy money transfers and unmatched benefits—open your accounts today.

2-Day Early Direct Deposits¹ Put your money to work for you faster.	Simplified Banking Manage everything in one secure, user-friendly platform.	Dedicated Support Access expert guidance tailored to your banking and borrowing goals.
--	---	--

Pairing your accounts will simplify your finances, provide seamless transfers, and maximize your earnings.

[Get Started](#)

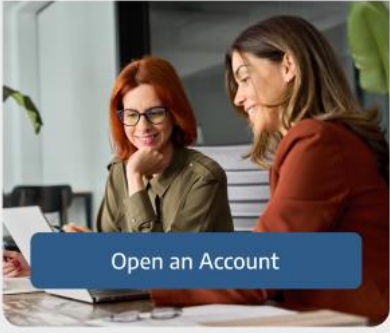
Don't miss out on this limited-time opportunity to earn up to **4.66% APY*** by pairing your Cash Management Checking and Investor Savings.

Up to 4.66% APY*	0.51% APY*
-------------------------	-------------------

In-App Marketing Tile

Maximize your earning potential.

Get funds to your advisor quickly while earning competitive rates with Axos Elite.



[Open an Account](#)

[Main Page](#)

Axos Elite Bundle | Your Client's Communication Experience

Investor Savings Marketing Experience | End investor already has an existing Cash Management Checking account

Email 1 | Your client will receive this email four days after clicking the marketing tile.

Email 2 | Your client will receive this email if they haven't started an application within 15 days of receiving the first email.

In-App Marketing Tile

Competitive interest added to convenience.

The ease of your Cash Management Checking meets the earning power of Investor Savings.

An email marketing tile with a dark blue background. At the top is the Axos logo. The main headline reads "Upgrade Your Experience and Earn a Competitive Yield". Below this is a photo of a man in a suit holding a tablet. At the bottom is a blue button that says "Open My Account".

Enhance your earnings by upgrading to the Elite Bundle. Link your Cash Management Checking Account with an Investor Savings Account for effortless transfers and interest rates as high as up to 4.66% APY*, provided you fulfill the minimum monthly criteria. Upgrade now to make the most of your funds.

A white marketing tile with a dark blue header. The header text says "Pairing your accounts comes with additional perks:". Below this are three icons with corresponding text: a money bag icon for "High Interest Rates", a calendar icon for "Access Funds Sooner", and a downward arrow icon for "Get your direct deposits up to 2 days early.".

High Interest Rates

Earn up to 4.66% APY* on savings, and 0.51% APY* on checking when you meet requirements.

Access Funds Sooner

Get your direct deposits up to 2 days early.* You've earned it, so start earning on it.

An email marketing tile with a dark blue background. At the top is the Axos logo. The main headline reads "Maximize Your Savings Potential". Below this is a photo of a man and a woman in business attire talking. At the bottom is a blue button that says "Open My Account".

Your Cash Management Checking sets the stage for success—pair it with an Investor Savings to enjoy seamless fund transfers and up to 4.66% APY*.

A white marketing tile with a dark blue header. The header text says "Here's what you'll gain when you bundle accounts:". Below this are two columns of benefits, each with an icon: "Seamless Banking" (money bag icon) and "Instant Transfers" (money bag icon). At the bottom are two blue boxes showing interest rates: "Up to 4.66% APY*" for Savings and "0.51% APY*" for Checking. Below these is a dark blue footer with the text "Here's how easy it is to qualify:" and "Qualifying Direct Deposit" / "Qualifying Deposit".

Here's what you'll gain when you bundle accounts:

Seamless Banking
Manage all your funds in one easy-to-use platform.

Instant Transfers
Fast access to funds for brokerage transfers—no holds on deposits.

Up to 4.66% APY*
Savings

0.51% APY*
Checking

Here's how easy it is to qualify:

Qualifying Direct Deposit Qualifying Deposit

Main Page

Axos Elite Bundle | Your Client's Communication Experience

Abandoned Application Marketing Experience

In-App Marketing Tile Reminder

Your application is almost finished.

Smarter savings that grow your money faster are at your fingertips. Finish your application for the Axos Elite bundle.



Email 1 | Your client will receive this email one day after starting but not completing an application

An email layout for Email 1. It starts with the Axos logo at the top. Below is a photo of a man and a woman in business attire talking. The text reads: "Hi [FirstName], We noticed you started the [PRODUCT] application but didn't finish. With this product, you can easily transfer funds to your investment account managed by your financial advisor, creating well-integrated finances. These are some of the innovative banking benefits you will unlock once your application is finalized and approved:" Below this is a list of four benefits, each with an icon: "Receive Direct Deposits up to 2 Days Early!" (calendar icon), "No Overdraft or Non-sufficient Fund Fees" (no sign icon), "Competitive Interest Rates: 0.51% APY* on checking and up to 4.66% APY* on savings" (dollar sign icon), and "Access to a \$5,000 Overdraft Line of Credit" (dollar sign icon). At the bottom is a blue button that says "Complete My Application". A footer section says "Manage your money in one place. Download our app." with a QR code and a smartphone mockup showing the app interface.

Email 2 | Your client will receive this email if they haven't completed their application within 15 days of receiving the first email.

An email layout for Email 2. It starts with the Axos logo at the top. Below is a photo of a smiling man in a suit holding a tablet. The text reads: "Hi [FirstName], Complete your [PRODUCT] application and start enjoying easy, secure fund transfers to your investment account managed by your financial advisor. Together, we'll seamlessly connect you to the Axos digital banking experience, where you'll enjoy:" Below this is a list of four benefits, each with an icon: "Receive Direct Deposits up to 2 Days Early!" (calendar icon), "Access to a \$5,000 Overdraft Line of Credit" (dollar sign icon), "Competitive Interest Rates: 0.51% APY* on checking and up to 4.66% APY* on savings" (dollar sign icon), and "No Overdraft or Non-sufficient Fund Fees" (no sign icon). At the bottom is a blue button that says "Complete My Application". A footer section says "Manage your money in one place. Download our app." with a QR code and a smartphone mockup showing the app interface. At the very bottom, it says "Questions? We're here to support you with" next to a small photo of a woman.

Main Page

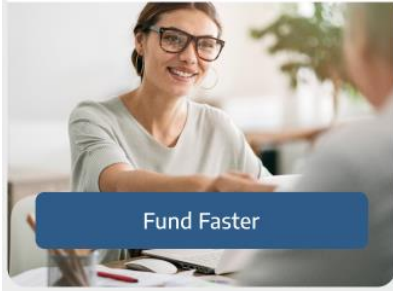
Axos Elite Bundle | Your Client's Communication Experience

Account Funding Marketing Experience

In-App Marketing Tile Reminder

Strengthen your advisor-led financial plan.

Access your funds up to 2 days early when you set up direct deposit. Transfer funds to your advisor-managed investments and move at the speed of the market.



Fund Faster

Email 1 | Your client will receive this email one day after opening their account without funding it

Welcome to Axos Elite

Effortlessly transfer funds to your investment account managed by your financial advisor and view all your finances in one place—all while earning up to **4.66% APY***.

[Set Up Direct Deposit](#)

Start enjoying elite benefits—fund your account quickly and securely today!

- Direct Deposit**
Set up automatic recurring direct deposits.
[Set Up Direct Deposit >](#)
- Wire Transfer**
Enjoy unlimited complimentary domestic and international wires.
[Get Wire Details >](#)
- Bank Transfer**
Transfer money from another account.
[Transfer Funds >](#)
- Mobile Check Deposit**
Deposit checks from your smartphone.
[Deposit Check >](#)

Start earning up to **4.66% APY*** by meeting the Cash Management Checking and Investor Savings account qualifications.

Email 2 | Your client will receive this email if they haven't funded their account within 30 days of receiving the first email.

Easily transfer funds from your Axos Elite accounts and watch them grow.

Hi **[FirstName]**,

To start enjoying all the benefits of your Axos Elite accounts—all you need to do is add money. Once funded, you can seamlessly transfer funds to your investment account, make transactions, and pay bills.

The easiest way to fund your account and maximize your account benefits is by setting up a recurring direct deposit. Access your funds up to 2 days early* and put your money to work faster.

[Set Up Direct Deposit](#)

Next, schedule a transfer to move money to your investment account managed by your financial advisor.

[Transfer Money](#)

Start earning up to **4.66% APY*** by meeting the Cash Management Checking and Investor Savings account qualifications.

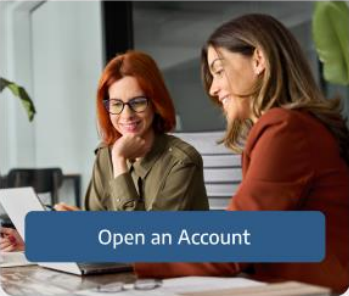
Main Page

Axos Elite Bundle | Your Client's Communication Experience

Marketing Tiles and Banners

In-App Marketing Tile Examples

Maximize your earning potential.
Get funds to your advisor quickly while earning competitive rates with Axos Elite.



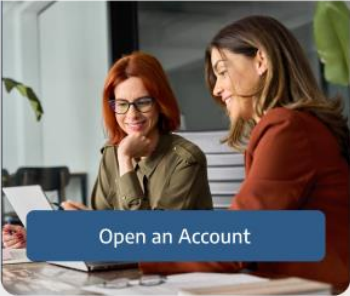
Open an Account

Strengthen your advisor-led financial plan.
Access your funds up to 2 days early when you set up direct deposit. Transfer funds to your advisor-managed investments and move at the speed of the market.




Fund Faster

Competitive interest meets convenience.
Axos Elite helps move funds quickly towards your managed investments.




Open an Account

Optimize your money with direct deposit.
Set up direct deposit for effortless money movement and allow your advisor to put your money to work faster.



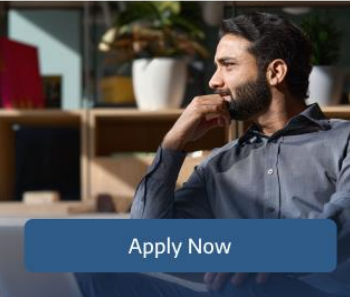
Fund Faster

Your application is almost finished.
Smarter savings that grow your money faster are at your fingertips. Finish your application for the Axos Elite bundle.



Finish Now

Competitive interest added to convenience.
The ease of your Cash Management Checking meets the earning power of Investor Savings.



Apply Now

Web Browser Banner Examples

Did you forget something?
Return to your application and unlock a competitive rate with the Axos Elite bundle.

Finish Now

Effortless growth. Elite rates.
Enhance your advisor-driven strategy with Axos Elite. Unlock easy money transfers and competitive rates.

Open an Account

Early pay. Elite benefits.
Get your money working for you up to 2 days early with direct deposit.

Enroll Now

Axos Elite Bundle | Disclosures

* The Annual Percentage Yield (APY) is accurate as of 04/03/2025. The base and promotional interest rate and corresponding APY for Cash Management Checking is variable and is set at our discretion. The base and promotional interest rate and corresponding APY for Investor Savings is variable and is set at our discretion. Investor Savings is a tiered variable rate account. Cash Management Checking is a non-tiered variable rate account. Interest rates may change as often as daily without prior notice. Fees may reduce earnings.

Promotional terms and conditions are subject to change or removal without notice. Incentive may be taxable and reported on IRS Form 1099-MISC. Consult your tax advisor. After the accounts are opened, the amount of incentive earned will depend on meeting the additional requirements outlined below.

The Cash Management Checking account will earn a base rate of 0.00% APY. The Investor Savings account will earn a base rate of 1.00% APY.

Cash Management Checking and Investor Savings accounts are eligible to receive a promotional APY for each statement cycle where the promotional criteria are met during the Qualification Period. To receive the promotional APY on both Cash Management Checking and Investor Savings, the Cash Management Checking account must meet both of the requirements in either Option 1 or Option 2 below during the Qualification Period:

Option 1

Your Cash Management Checking account has received qualifying direct deposits of at least \$1,500 in total.

The average daily balance of your Cash Management Checking account is at least \$1,500.

Option 2

Your Cash Management Checking account has received qualifying deposits of at least \$5,000 in total.

The average daily balance of your Cash Management Checking account is at least \$5,000.

If both of the requirements in either Option 1 or Option 2 above are met during the Qualification Period:

- The Cash Management Checking account will earn a promotional rate of 0.51% APY for the statement cycle in which the requirements are met.
- The Investor Savings account will earn a promotional rate of up to 4.66% APY for the statement cycle in which the requirements are met.

The Qualification Period is from the 1st of the month through the 25th of the month. The Qualification Period for new accounts will begin on the day the account is approved. Any qualifying direct deposits received after the 25th of the month will count toward the next Qualification Period.

A direct deposit is an electronic deposit of your paycheck or government benefits, such as Social Security, Disability, etc. Other deposits (i.e., online banking transfers, ATM and mobile check deposits, etc.) or person-to-person payments are not considered a direct deposit.

Qualifying deposits only include deposits from the following eligible sources: (i) ACH transfers from external accounts, (ii) inbound wire transfers from external accounts, (iii) check deposits. Qualifying deposits do not include: (i) transfers internal to the bank (i.e., transfers between an account holder's Checking and/or Savings account), (ii) interest payments, (iii) promotional bonuses, (iv) credits, reversals, and refunds.

Both accounts must be in an open and active status on the date the interest is paid to receive the promotional APY for that statement cycle. Account transactions may take one or more business days from the transaction date to post to the account.

[Main Page](#)