

**Axos is capturing RIA  
Contact Information for  
your active personnel**



Earlier this year, Axos Advisor Services launched the Liberty Message Center functionality.

The Liberty Message Center is built on top of Service Cloud and provides bidirectional communication between you and our client service teams as well as the opportunity to submit and review statuses of requests. The system allows for multiple people within your firm to access requests within your office and provides greater visibility into what happens when you make a request.

To ensure we are capturing all personnel at your firm that communicates with us via phone and ultimately Liberty Messaging Center, Axos Advisor Services is seeking your assistance. Please complete the attached *RIA Contact Information Form* and return it to your Client Service Advocate no later than May 4, 2023. Receiving sooner than later will ensure our records are current.

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

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