Axos Advisor Services
RIA Contact Information Form

Leadership/Executive Team: Check Yes to receive our weekly RIAconnection communication

Position	Name	Email	Phone	Yes*
ex: CEO	John Smith	johnsmith@abccompany.com	111-111-1111	☐
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Authorized Office Personnel: Check Yes to receive our weekly RIAconnection communication

Office personnel are those authorized to submit requests and speak via phone with Axos Advisor Services

Position	Name	Email	Phone	Yes*
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Additional Personnel: Check Yes to receive our weekly RIAconnection communication

Office personnel are those authorized to submit requests and speak via phone with Axos Advisor Services

Position	Name	Email	Phone	Yes*
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Additional Notes you feel pertinent for Axos regarding contact information: