

**Axos DocuSign
Automation Effective
9/27/23**



We made improvements to our Axos DocuSign workflow which will go into effect on 9/27/23. With this change, Axos Advisor Services will always automatically receive the final copy of your completed envelopes regardless of what is entered in your workflow. This will allow for more streamlined and efficient processing of the request you complete within our instance of DocuSign. This will expedite the processing of your request, automatically creating cases that will be immediately viewable in Liberty Message Center and will be immediately sent to our processing teams.

No action needed by you; this is informational only!

This is our first step towards “Express” processing. Utilizing our preferred digital channels such as DocuSign, Liberty Upload and Liberty Message Center, will speed up the processing. These cases will be identified in the Liberty Message Center as “Express” in the Sub-type. In addition, the use of these digital channels helps mitigate the risk of fraud.

CASES
Viewing 7,592 of 7,592 results

Account	Representative	Name	Subject	Request Type	Sub-Type	Case #	Status	Create Date	Last Activity Date	Cr
854322		TEST 9623	Liberty DocuSign AAS Account Maintenance	Account Maintenance		01415010	New	09/08/2023 10:55:38 AM	09/08/2023 10:55:43 AM	Ki
854322		TEST 9623	Liberty DocuSign AAS Contributions	Contributions	Express	01415009	New	09/08/2023 10:55:23 AM	09/08/2023 10:55:35 AM	Ki

Please note, Axos Advisor Services will always receive the final copy of your completed envelopes regardless of what is entered in your workflow. So, any additional emails you send with completed envelopes could be duplicate submissions.

If you have immediate questions, please contact your CSA.

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

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