

# eDelivery Program

## Enhancing the Client Experience with Timely and Secure Document Delivery

### What is the eDelivery Program?

When your clients sign up for eDelivery, they will receive email notifications when important account documents from Axos Advisor Services are ready for instant access through the Axos Client Portal and Liberty. Clients can simply – and securely – log in to view, download, and print their documents at any time.

### Documents Available Electronically

- Statements
- Proxies
- Tax forms
- RMD letters
- **Coming Soon**
  - > Account confirmations
  - > Advice letters
  - > IA Authorization letters (annual, setup, and distributions)
  - > Welcome letter and kit

### Why You Should Promote eDelivery to Your Clients

**Convenience** – Clients will have instant access to view, download, and print any of their documents from their mobile device or computer.

**Secure** – Documents are stored in a password-protected environment instead of being delivered through the traditional mail system. This helps reduce the risk of lost or stolen mail with important account information.

**One location** – Account information and documents are available in one location eliminating the need to keep track and store paperwork.

### How do Clients Enroll in eDelivery

**Axos Client Portal** – The easiest way for your clients to enroll into eDelivery is through the Axos Client Portal. If your firm has adopted the Axos Client Portal your clients opt into eDelivery when they register. Once they are registered no additional action is required.

**Liberty** – Clients can also opt into eDelivery through Liberty by navigating to the “About Your Account” tab and select “Electronic Delivery Method” to select and receive documents electronically.

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

Axos Advisor Services is a trade name of Axos Clearing LLC. Axos Clearing LLC provides back-office services for registered investment advisers. Neither Axos Advisor Services nor Axos Clearing LLC provides investment advice or make investment recommendations in any capacity. Securities products are offered by Axos Clearing LLC, Member FINRA & SIPC. Axos Clearing, LLC does not provide legal, accounting, or tax advice. Always consult your own legal, accounting, and tax advisors.

**Please Note:** *When opting into eDelivery your clients will receive an email to confirm their selections for each document type that was enabled for eDelivery. When an updated document is available, your client will receive an email notification to login to view the new document.*

If you have any questions about the eDelivery Program, please contact your Client Services Advocate.

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

Axos Advisor Services is a trade name of Axos Clearing LLC. Axos Clearing LLC provides back-office services for registered investment advisers. Neither Axos Advisor Services nor Axos Clearing LLC provides investment advice or make investment recommendations in any capacity. Securities products are offered by Axos Clearing LLC, Member FINRA & SIPC. Axos Clearing, LLC does not provide legal, accounting, or tax advice. Always consult your own legal, accounting, and tax advisors.