Coming Soon: Email Communications with your Axos team



Currently, when you send an email to <u>aas-team###@axosadvisorservices.com</u>, an email is generated to your Client Services Advocate. With our new enhancement, once the email is received, a case will automatically be generated and routed to the correct processing team to expedite your request. Upon case opening, you will receive a reply, showing your case was received and a case number for reference. *See example below:*

Thank you for contacting Axos Advisor Services.

This is an automatic notification to let you know that we have received your inquiry.

For reference, your Case ID is 02062031. You may also see a unique identifier automatically included at the bottom of this and subsequent emails. Please do not remove this code from future communications.

Original Message

Subject: Testing

Important Changes Impacting Encrypted Emails:

To expedite case processing, you and your teams may submit requests and forms <u>directly and securely</u> to your Axos Client Service Advocate using the *Liberty Message Center*. Alternatively, if you choose not to use the Liberty Message Center, you may send us encrypted emails using the following link:

aasclientservices@13ggu1hgx6c4qmjt6e0j729699iunv5kv8qjpod7ha1wspnfl.i-ktrfeas.na118.case.salesforce.com

Liberty Message Center provides immediate visibility into your requests and shows your teams the status of that request. This includes all emails and communications related to each request, all in one place. Message Center also offers direct communication on a request to your Axos CSA team, so you can respond to requests for additional information within Liberty.

Encrypted emails sent directly to the team email, may experience delays.

For more information on these features, please contact your Axos Client Service Advocate.

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

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