

# Getting to Know Axos Advisor Services



Dear Valued Client,

We are excited to be in the final stage of our transition to Axos Advisor Services on July 26! We believe you will find this new relationship extremely beneficial to you, your business and your clients. Below is a sneak peek into Axos as a company, and the new opportunities and rejuvenation that we are looking forward to as a result of this new relationship.

## **Born digital**

Axos is a technology-driven financial services company that provides customized products and services to customers nationwide. Born digital, Axos challenges the status quo by liberating its clients from the constraints of traditional approaches. The firm brings together human insight and digital expertise to anticipate and meet clients' needs.

## **A proven leader**

Axos' commitment to excellence is validated by the various awards and recognition it has received from the likes of [Forbes](#), [Fortune](#), and [Kiplinger](#) for its financial expertise and quality of products and services. We are extremely excited about the opportunity to tap into these capabilities, giving you the ability to offer a wider range of products and services to your clients. Today, a comprehensive financial solution is instrumental in building value with new clients and enhancing your offering to current clients.

**Want to know more about Axos Advisor Services? [Click here.](#)**

## **Client-first approach**

Our spirit aligns well with the Axos commitment to technology leadership, putting clients first, and practice of truly listening to clients and their needs. As Axos Advisor Services, we will remain dedicated to being a non-competitive, full-service custodian and clearing firm with a laser focus on supporting independent RIAs. Additionally, Axos is committed not only to continuity of our leading technology and relationship-based, responsive service that you know and love, but they are also committed to investing additional resources to help us deliver you even more.

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We're excited to be serving you as Axos Advisor Services soon, and we look forward to a great future together. Please be sure to review our most recent [FAQs](#) regarding this transition. If you have any questions or concerns about the upcoming transition, please contact your Client Service Advocate.

Sincerely,

E\*TRADE Advisor Services

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

The E\*TRADE Financial, LLC family of companies provides financial services, including trading, investing, investment advisory, RIA custody and banking products and services.

E\*TRADE does not provide legal, accounting, or tax advice. Always consult your own legal, accounting, and tax advisors.

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