



[IMB Barcode]

[Processing Sequence Line]

[Name]

Date XX, 2025

[Address 1]

[Address 2]

[Address 3]

[City, State, Zip]

## Notification of Enhanced Financial Advisor Authorizations

### **Information Only – No Action Required**

RE: Advisor Authorizations

Dear Client,

We are excited to inform you of an update that will enhance your Financial Advisor's ability to service your investment account. This notification is for informational purposes only, and no action is required on your part.

When you signed the (form), you authorized your Financial Advisor to initiate distributions or contributions on your account(s). At that time, your advisor was limited to processing your requests for money movements below \$100,000. We are pleased to announce that your Financial Advisor is now permitted to initiate based upon your request a distribution or contribution of up to \$250,000 via ACH, or up to \$1,000,000 through Wire or Check to your account's Address of Record. Please note that ACH or Wire requests can only be directed to the account that you previously authorized.

At Axos Advisor Services, we routinely review transaction types and dollar limits to ensure the best service for our clients. As a result, we may adjust the permitted limits or transaction types for advisors in the future.

If you have any questions concerning this communication, please contact your Financial Advisor or Axos Advisor Services at 800-955-0245.

As always, we appreciate your business and look forward to continuing to serve your account in the future.

Sincerely,

Axos Advisor Services