

Liberty Message Center

Bulletins Enhancement

Your feedback has helped inform another new feature within Liberty. We are introducing the new "Pending Message Center Cases" bulletin.

This bulletin is updated hourly and is easy to access upon login to Liberty or through your API-integrated technology. It will keep you up to date on all cases requiring your attention.

The new **Pending Message Center Cases** bulletin details will include:

- > Pending case count
- > Account number
- > Account name
- > Rep ID
- > Request type
- > Case #
- > Status

Bulletins : Pending Message Center Cases

The screenshot displays the Liberty Message Center interface. The main bulletin is selected, showing details for 'Pending Message Center Cases' on 08/07/2024 at 02:55:39pm. A secondary table provides a detailed view of 20 pending cases, including account numbers, names, representative IDs, request types, case numbers, and statuses.

Account number	Account name	Rep	Request Type	Case #	Status
210574	Sherry Newman	1444	AAS Advisor Authorization	01459015	Closed with Secure Message
210488	Arjana Yuro	1444	AAS New Account	01458931	Pending Customer Response
210568	Hicks Kellyn Hert	1328	AAS Account Beneficiary	01458930	Closed with Secure Message
994393	SARSEP IRA T TEST AUTOMATED	n/a	Other Paperwork	01458874	Pending Customer Response
210488	Arjana Yuro	1444	AAS New Account	01458671	Pending Customer Response
993928	Test Trust	n/a	AAS Account Maintenance	01458516	Closed with Secure Message
210488	Arjana Yuro	1444	AAS New Account	01458341	Closed with Secure Message
211524	Dodd H. Brix	1326	AAS Alternative Investment	01458281	Closed with Secure Message
211524	Dodd H. Brix	1326	AAS Account	01458280	Pending Customer

Bulletins: Pending Message Center Case Details

<i>Must Read</i>	<i>Date</i>	<i>Time</i>	<i>Subject</i>			
Yes	08/07/2024	11:17:59am	Pending Message Center Cases			
Messages						
Pending case count 16						
Viewing 16 results						Export data
Account number	Account name	Rep	Request Type	Case #	Status	
210488	Arjana Yuro	1444	AAS New Account	01458671	Pending Customer Response	
993928	Test Trust	n/a	AAS Account Maintenance	01458516	Closed with Secure Message	
210488	Arjana Yuro	1444	AAS New Account	01458341	Closed with Secure Message	
211524	Dodd H. Brix	1326	AAS Alternative Investment	01458281	Closed with Secure Message	
211524	Dodd H. Brix	1326	AAS Account Beneficiary	01458280	Pending Customer Response	
210570	Melton Neemia Modica	13315	AAS Account Maintenance	01456068	Pending Customer Response	
211518	Joyelle I. Ottinger	1326	AAS Account Maintenance	01448687	Pending Customer Response	
210572	L-simple Alesandrini	1444	AAS Tax	01447207	Pending Customer Response	
210574	Sherry Newman	1444	AAS Account Maintenance	01447203	Pending Customer Response	
210568	Hicks Kellyn Hert	1328	AAS Stop Pay Check	01447143	Pending Customer Response	
(1 of 2) << < 1 2 > >> 10 ▾						

Questions? Please reach out to your Client Service Advocate for more information.

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.