

Quarterly Statements

Deadlines & Guidelines

Important Statement Deadlines

Logo changes must be submitted by the 15th of the prior month. *

- For Q2 statements, the submission deadline is **June 15**.

Advisor inserts and custom messaging must be submitted by the last day of the prior month. *

- For Q2 statements, the submission deadline is **June 30**.

Please work with your Client Service Advocate for statement customization and submissions. You can find the Quarterly Customization Schedule in the [Quick Links section](#) of our RIA Connection bulletins webpage.

**Deadlines that fall on non-business days will be adjusted to the previous business day.*

Important Guidelines

Statement Inserts

- Cannot exceed three pages
- Non-regulatory communications only
- Requires 1-inch clear space margin border

Statement Messages

- Up to 33 lines long, with a maximum of 74 characters per line
- Messages should include a line between paragraphs
- Bullet points, special characters, and indentations are not supported
- Special fonts, italics, or bold text is not supported
- If you have an existing recurring statement message, it will continue unless we receive updated instructions

Questions? Please reach out to your Client Service Advocate.

For Institutional Use Only. **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.