

Retirement Accounts without any Beneficiaries



Making and maintaining beneficiary designations is an essential part of everyone's financial plan. Having a current beneficiary on file for all your clients' accounts leaves no doubt about where your clients want their money to go if something were to happen. Failure to name beneficiaries can tie up one's property in probate potentially for years and leave a mess for you as the RIA.

In the coming weeks, your Client Service Advocate will reach out to you with a list of retirement accounts without any designated beneficiary. While we do not require a beneficiary to open an account, we want to ensure that this was not an oversight when the client established their accounts.

As always, you can find the beneficiary designation form on Liberty or our website axosadvisorservices.com/Forms-and-Applications

If you have any question, please contact your Client Service Advocate.

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

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