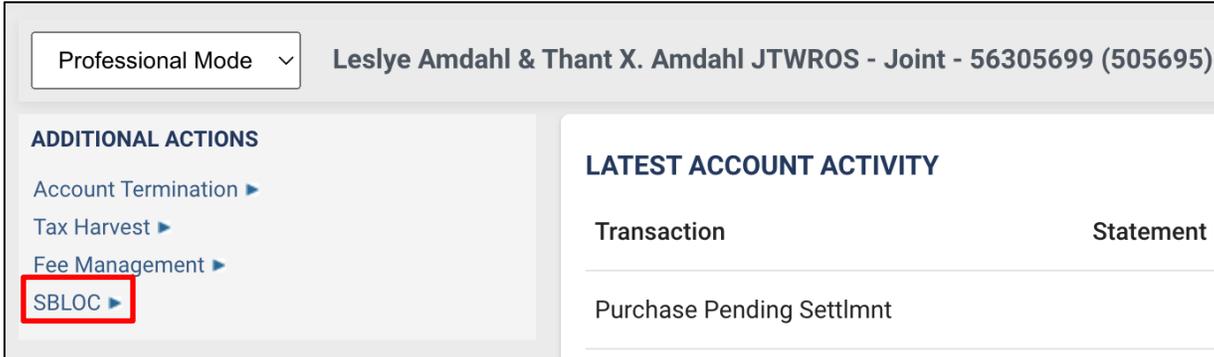


# Securities-Backed Line of Credit (SBLOC)

## Liberty User Guide

### How to Execute an SBLOC from Liberty

#### Additional Actions > Overview



Professional Mode ▾ Leslye Amdahl & Thant X. Amdahl JTWROS - Joint - 56305699 (505695)

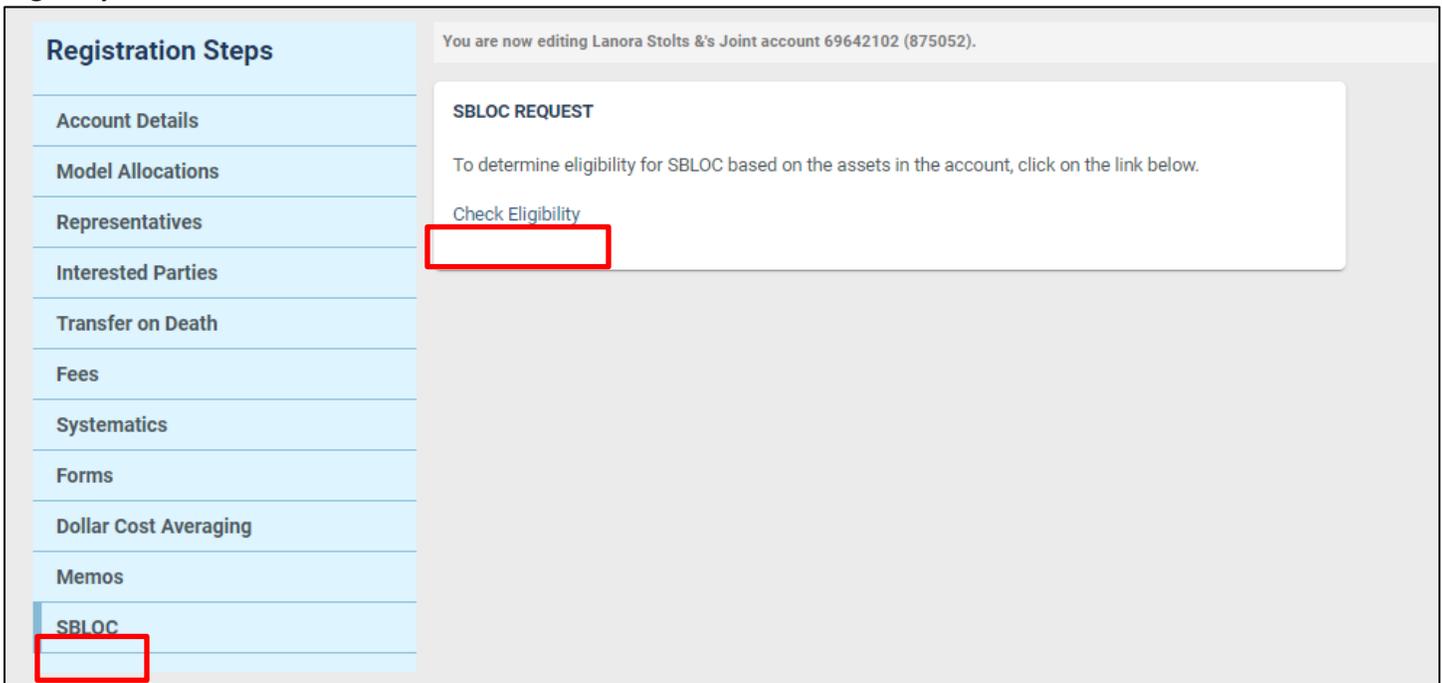
**ADDITIONAL ACTIONS**

- Account Termination ▶
- Tax Harvest ▶
- Fee Management ▶
- SBLOC ▶**

**LATEST ACCOUNT ACTIVITY**

Transaction	Statement D
Purchase Pending Settlmnt	

Clicking on SBLOC will bring up the Registration Steps menu; select SBLOC to bring up the SBLOC page. Select Check Eligibility



**Registration Steps**

- Account Details
- Model Allocations
- Representatives
- Interested Parties
- Transfer on Death
- Fees
- Systematics
- Forms
- Dollar Cost Averaging
- Memos
- SBLOC**

You are now editing Lanora Stolts & s Joint account 69642102 (875052).

**SBLOC REQUEST**

To determine eligibility for SBLOC based on the assets in the account, click on the link below.

[Check Eligibility](#)

*Note: The eligibility process might take a few minutes to authenticate.*

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

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**Based on the eligibility criteria, you will see the following messages:**

*Eligible for an SBLOC*

You are now editing Lanora Stolts &'s Joint account 69642102 (875052).

**SBLOC REQUEST**

Account 875052 is eligible for SBLOC with a minimum line of \$75,000 and a maximum line of \$137,000. To start the application for SBLOC, click the link below.

[Request SBLOC](#)

**Not eligible for an SBLOC**

You are now editing Ingo Vatulas's Individual account 48256272 (763165).

**SBLOC REQUEST**

Your account 763165 is not eligible for SBLOC

**If the account is eligible, select Request SBLOC to bring up the SBLOC form**

You are now editing Lanora Stolts &'s Joint account 69642102 (875052).

**SBLOC REQUEST**

Account Number	Address		
<input type="text" value="875052"/>	<input type="text" value="6596 Baywood Ct"/>		
Primary Name	City	State	
<input type="text" value="Lanora Stolts &amp;"/>	<input type="text" value="ALBUQUERQUE"/>	<input type="text" value="New Mexico"/>	
Primary SSN	Zip	Country	
<input type="text" value="829-29-7850"/>	<input type="text" value="87194"/>	<input type="text" value="United States"/>	
Primary Recipient Data		Phone Number	
Email <input type="text"/>		<input type="text" value="(078) 340-1231"/>	
Secondary Recipient Data		Phone Number	
Email <input type="text"/>		<input type="text" value="(396) 468-9645"/>	
Loan Information			
Min Loan Amount	Offered Rate		
<input type="text" value="\$75,000.00"/>	<input type="text" value="10.2700"/>		
Max Loan Amount	Loan Amount	Margin:	
<input type="text" value="\$137,000.00"/>	<input type="text"/>		

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**Fill out the form and select Submit.**

## Questions

As an Axos Advisor Services client, your firm receives VIP advisor support through our Premier Banking and Lending Solutions team. If you have questions about SBLOC, please call 877-887-3030 to speak to a premier team member. If you have any additional needs or questions, please contact your Client Services Advocate.

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