

**Current Contra Firm
Statements needed
when submitting
Axos Transfer Forms**



To mitigate delays in transferring accounts to Axos Advisor Services, please provide the most current monthly or quarterly statement. At most, we require a statement dated within the last 90 days. Additionally, the statement must reference CUSIPS or tickers for the assets being re-registered.

If you have any questions or concerns, please contact your Client Service Advocate.

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

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