

Enhanced Client Experience For eDelivery Enrollment

Now Available for New Accounts

We have made improvements to streamline the process for eDelivery enrollment for new accounts.

With this enhancement, clients who provided an email address on their application will automatically receive an email notification to confirm their email address and accept electronic delivery for all documents. If your client does not confirm their email address and does not accept electronic delivery, they will receive all their documents via paper.

If your client has already registered for the Axos Client Portal, they have already opted into electronic delivery for all documents and will be notified via email when new documents are available to view. eDelivery and Axos Client Portal allow your clients to view, download, and print their documents easily and securely.

Sample eDelivery Enrollment Email

Dear \$\$ACCOUNT_NAME\$\$,

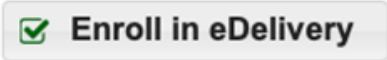
Thank you for recently opening an account with your advisor at Axos Advisor Services. During the application process, you elected to receive documents delivered electronically to the email address on file.

For \$\$ACCOUNT_MASKED\$\$, please click [on the link below](#) to enroll in the [eDelivery program](#). When you opt-in, you will receive these items electronically:

- Statements
- Trade Confirmations
- Tax Forms
- Proxies
- Notices, amendments, and other important account updates

By enrolling in the [eDelivery program](#), you will avoid paper mail with sensitive information [getting in the wrong hands](#) or important information being lost in a fire, flood, or other natural disaster.

[Click here](#) or on the button below to sign up for fast and easy enrollment!

A rectangular button with a green checkmark icon on the left and the text "Enroll in eDelivery" in bold black font.

If you have any questions, please reach out to your advisor.

Thank you,
Axos Advisor Services

If you have any questions, please contact your Client Services Advocate.

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

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