

**Beginning November 2022, an enhanced Returned Mail process will be implemented**



From time to time, account owners move to a new location without updating their address with their advisor or updating such on Liberty.

Axos Advisor Services has subscribed to the USPS National Change of Address (NCOA) service. Beginning in November, we will begin receiving a file from the USPS which reflects account owners that may have updated their address or have a forwarding order on file with the USPS.

While we'll not be updating our files with the information provided from the USPS, we will mail a letter to the account owner asking that they confirm their updated address by completing the accompanying Change of Address form, or they can update their address directly in Liberty.

Account owners will be presented a QR code on the letter that drives them to Liberty to update their address if they are so inclined.

Although the form will be returned to Axos for updates or the account owner can update their address directly on Liberty, the RIA will receive a bulletin when we updated such. This will ensure your and our records are updated.

A sample of the letter we'll be sending to account owners accompanies this feature.

Let your Client Service Advocate know of questions you may have.

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

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