Axos Client Portal FAQs

ADVISOR SERVICES

Getting Started

How will my clients access the portal?

- Clients can access the portal through our mobile application or through a web browser. The mobile application will be available for download in the app store for Android or Apple. Clients will also be provided with a QR code and website link via email to register for an account.

How will they be notified when the portal is available to them?

- Once the portal is live for your firm, new clients will receive a registration email link after the new account application is submitted and approved. Existing clients can be invited through an email triggered by Axos and your CSA. Additionally, you will be able to provide the registration link directly to your clients.

My clients log into Liberty today, will they be able to log in to the new portal with their same username and password?

- No, clients will need to establish a username and password for the new portal. They can choose to register with their current Liberty username and password, if the password meets the new portal's security criteria.

Will my client need multiple logins to see their accounts?

- Clients will see all of their accounts that are associated with their tax ID.

Can my client still access their information through Liberty?

- Once your client registers for the Axos Client Portal, they will no longer have access to their accounts through Liberty.

What will my client see within the Axos Client Portal?

- Your client will have access to view: all their accounts managed by you, accounts with Axos Bank, and any external accounts they aggregate. The portal also allows clients to sign up for free credit score monitoring.

If my client opts out of marketing communications from affiliates, what will their portal experience be?

- Axos Financial will always honor client opt-outs. Regarding the portal, a client who opts out of marketing from our affiliates will not see any products or services related to banking or any other affiliate offerings.

Portal Details

Will I be able to communicate with my client through the portal?

- Not at launch, however, two-way client communication through the portal is on our roadmap. We will communicate all enhancements to the portal as they become available.

Will I have access to my client's bank account information?

- Your clients will have the option to elect to share their account number and balance information with you. They will be able to change this election at any time within the Axos Client Portal.

Will I be able to shadow my client in the portal the same way I can today in Liberty?

- No, clients can share their screen with you via their screenshare technology of choice (Zoom, Teams, etc.).

Will my client be able to contribute to their investment account?

- Yes, clients can contribute to their investment account using the Axos Client Portal. The portal allows for internal transfers from Axos Bank accounts, including mobile deposits made through Investor Checking, and ACH from external financial institutions.

Will my clients be able to pull money from their investment accounts?

- Clients cannot execute distributions within the portal. The process will remain the same as it currently is in Liberty. You would need to initiate any distribution to a client's bank account, as long as the client has signed the advisor authorization.

Will I be notified of transfers within my clients' investment accounts?

- Yes, you will be notified of contributions made to your clients' investments within the portal.

Will this change my ability to move money?

- No, you will have the same money movement capabilities that you have today. Nothing is changing in this process as it pertains to your efforts.

Will my clients be able to trade?

- No, clients will not be able to execute trades through the portal. However, Axos is continually adding features and benefits to support your relationship with clients.

Will my clients be able to access their digital documents – statements, tax forms, etc.?

- Yes, clients will have access to their digital documents through the portal. If your client is a statement head, they will still be able to see the consolidated statements of their statement family.

Help and Support

How do we update the portal if we change our address?

- Changes can be made at any time. If you have updates, please reach out to your Client Service Advocate.

What should I do if my client needs to reset their password?

- The portal has self-service password reset functionality. Clients can reset their password through a web browser or the mobile app.
- For security purposes, we lock client accounts after multiple failed attempts to perform the password reset functionality. If a client experiences this, our team can provide support to restore their access.

What if my clients have issues using the portal?

- Your client can contact our dedicated support team at 866-833-0529. If you are having issues using the portal, please contact your Client Service Advocate.

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