

Forms Submission Email Enhancement



We continue to enhance the form submission process. Coming soon, when you email to formsubmission@axosadvisorservices.com a case will automatically be generated and routed to the correct processing team to expedite your request. Upon receipt, you will receive a reply, showing your case was received and a case number for reference. If applicable, multiple cases will be created if your email submission contains more than one form. *See example below:*

Thank you for contacting Axos Advisor Services.

This is an automatic notification to let you know that we have received your request for document processing.

For reference, your Case ID is 02096500. Some submissions may result in additional Case IDs being assigned, all cases are accessible to you within Liberty Message Center.

You may also see a unique identifier automatically included at the bottom of this and subsequent emails. Please do not remove this code from future communications.

Did you know that you can securely communicate with your Client Service Advocate via the Liberty Message Center! Your CSA is happy to provide to you a demonstration.

Original Message

Subject: *Test 8/3*

Once the case is generated, you can navigate to the message center for status updates. Please note that it may take several minutes for any forms to be viewable in the case.

Did you know, with ***Liberty Message Center***, you and your teams may submit requests and forms directly and securely to your Axos Client Service Advocates?

Liberty Message Center provides immediate visibility into your requests and shows your teams the status of that request. This includes all emails and communications related to each request, all in one place. Message Center also offers direct communication on a request to your Axos CSA team, so you can respond to requests for additional information within Liberty. In addition, the Message Center can be permissioned accessible to any user in your office.

For more information on these features, please contact your Axos Client Service Advocate.

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