Axos Client Portal

Frequently Asked Questions

Getting Started

How will my clients access the portal?

Clients can access the portal through our mobile application or through a web browser. The portal will be rolled out over the first quarter of 2024. When your portal is launched, clients will be provided instructions on how to access the portal via web or mobile.

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

Existing clients can be invited through an email triggered by Axos and your CSA during the rollout phase. Additionally, you will be able to provide the registration link directly to your clients. Once the portal is live for your firm, any new clients that you onboard will be sent an invitation to access the portal via email once their account is opened.

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?

No, the Axos Client Portal does not require different logins for various accounts. Clients will see all their accounts that are associated with their tax ID. For statement families, documents will be visible within the Portal. If your client's tax ID is associated with the owner of the account, they will have the ability to click into the account, view documents, and contribute to the account.

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 and spending analysis.

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?

Not at launch; however, in an upcoming enhancement, clients will have the option to elect to share their account number and balance information with you. This election can be changed at any time within the 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. Deposits can be made directly to their investment account using the portal via ACH, or through internal transfers from Axos Bank accounts, including mobile deposits made through Investor Checking. External transfers, such as ACH, may take 24-48 hours to process.

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. If your client has signed the advisor authorization, you can initiate distributions to the client's bank account. There have been no changes to this process, and it will continue to be done through Liberty.

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 via a bulletin.

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 at this time.

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.

What if our firm already utilizes a third-party vendor for client access?
If you already have a client portal with a third-party vendor, you can continue to use it.

Help and Support

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 844-678-2722. If you have any questions about the portal or need assistance, please contact your Client Services Advocate.