

Announcing a change to our DocuSign authentication designed to provide a greater level of security



As part of our commitment to security and reliability, we work with our partners to ensure we all meet current industry standards for information security.

We are enhancing our authentication standards with DocuSign which now requires Axos Advisor Services to obtain consent from our advisors to continue to send DocuSign envelopes from our Liberty application. This is a one-time consent.

Beginning week September 6, 2022, we will begin the process of sending out emails allowing users to provide consent. The email will contain a link to DocuSign where users will be prompted to enter their DocuSign email address and password. Once authenticated into DocuSign, users can 'Allow Access' for our AAS Liberty application to continue to send DocuSign envelopes.

For additional information regarding this authentication change, please visit [DocuSign](#).

Providing consent in DocuSign:

- Enter the email address where the consent email was received.

A screenshot of the DocuSign Log In page. The page is white with the DocuSign logo at the top. Below the logo is the text "Log In". There is a text input field labeled "Email *" with the placeholder text "Enter email". Below the input field is a yellow button with the text "NEXT". At the bottom of the page, there is a link that says "No account? Sign up for free".

- Enter the DocuSign password. Leverage the 'Forgot password' feature for forgotten passwords.

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

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A screenshot of the DocuSign Log In page. At the top is the DocuSign logo. Below it is the text "Log In". Underneath is the email address "sampleadvisor@anywhere.com". There is a "Password" field with a red asterisk and a placeholder text "Enter password". Below the password field is a yellow button labeled "LOG IN". At the bottom, there is a link that says "Forgot password or Sign in as a different user".

- Select "Allow Access" to provide consent to our AAS Liberty application to continue to send DocuSign envelopes.

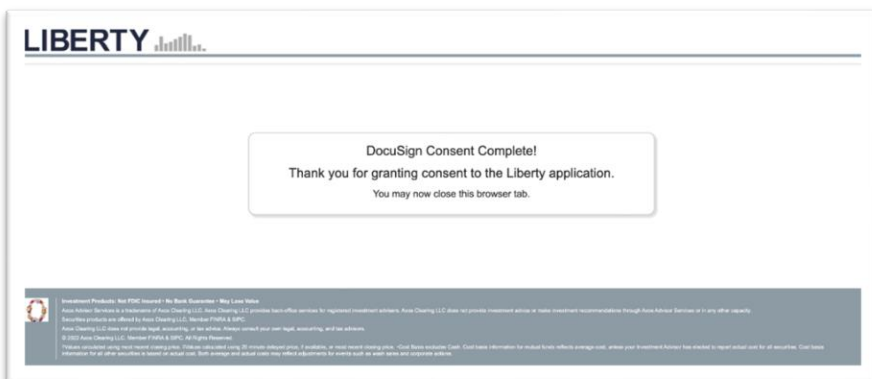
A screenshot of the DocuSign permission screen. At the top is the DocuSign logo. Below it is the text "Axos Advisor Services Liberty Application is Requesting Permission". There are two bullet points: "This application will be permitted to request access to your account without you being present." and "Create and send envelopes. Obtain links for starting signing sessions." Below the bullet points is a paragraph of text: "The application you are connecting to is not provided by DocuSign, Inc. By selecting ALLOW ACCESS, you are allowing the application to use your information in accordance with their respective terms of service and privacy policies." Below the text are two buttons: a yellow button labeled "ALLOW ACCESS" and a white button labeled "CANCEL".

- A thank you page will display indicating consent is complete.

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Sample email:

From: axosadvisorservices-liberty <no-reply@axosadvisorservices.com>

To: Sample.Client@anywhere.com

Subject: Axos Advisor Services Liberty Application Test - DocuSign Consent Request

As part of our commitment to security and reliability, we routinely work with our partners to ensure we meet or exceed current industry standards for information security.

We are enhancing our authentication standards with DocuSign, which now requires Axos Advisor Services to obtain your consent to continue to send DocuSign envelopes from our Liberty application.

To avoid any disruption to your ability to send and review envelopes within Liberty, please provide consent by clicking the link below, signing into your DocuSign account, and selecting Allow Access. Once the DocuSign Consent is complete, select Close.

< insert full URL here >

Please be sure to sign in using the DocuSign account associated with the email address receiving this notification. This is a one-time consent.

If you have any questions, please contact your Axos Advisor Services Client Services Advocate or your home office.

Thank you,

Axos Advisor Services

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