

# Cash/Margin Election in Liberty



## Cash / Margin Election in Liberty

You spoke and we listened.

In August 2023 we updated Liberty to support new features, including the ability to add limited use margin to an account. This change sets all new accounts to Margin, with the RIA having the ability to “uncheck” the Margin Account election to indicate that the account should be a Cash account.

On October 19, 2023, we will modify Liberty to make all new accounts default to Cash accounts, with the RIA simply needing to “check” the Margin Account election to indicate margin was desired.\*\*

### [Margin – Frequently Asked Questions](#)

Contact your Client Service Advocate if you have any questions.

The screenshot shows the Liberty account creation interface. A red arrow points to the "Margin account" checkbox, which is currently unchecked. A text box on the right states: "The Margin Account checkbox will be unchecked by default when creating a new account in Liberty". The form includes fields for company name, additional account information, statement frequency, and a "Create login for Liberty" checkbox. At the bottom, there are "Done", "Save", and "Continue" buttons.

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

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\*\* Initially, Axos Advisor Services will be soliciting indications of interest in the margin feature. The client's consent will be stored in the Axos database. When we are ready to enable the limited margin features the client will be notified and account converted from a Cash account to a Margin account. Account holders can cancel their consent at any time, which will ensure the account remains a Cash account.

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