

**Prior Year Removal of
Excess and
Recharacterization
Deadline**



The deadline to process a prior year removal of excess contribution or recharacterization is October 16, 2023. Request received by October 16, 2023, will be processed by Axos Advisor Services. Requests received after that date will not be processed and will be rejected.

Contact your Client Service Advocate if you have any questions.

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

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