

Requests for Establishing or Changing a Systematic Contribution or Distribution



Effective November 1st, when submitting a request to either establish a new systematic contribution or distribution or to change an existing systematic contribution or distribution, please submit the request at least ten days prior to the payment date.

Systematics must cycle through a program that places a pending transaction on the account, ensures cash is available, submits transmission files to an applicable bank, etc. to ensure that the contribution or distribution payment is posted on the appropriate date in which requested. For systematics to be posted on the appropriate date, requests should be submitted to Axos Advisor Services at least **ten days prior** to the payment date.

If a form is received within the 10 calendar day processing window, the systematic will be setup for the next scheduled date. **If you miss the cutoff, you can submit a one-time request.**

If you have any questions, please contact your Client Services Advocate.

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

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