

Going green is easier than ever

Sign up for eStatements



Get your statements sent digitally

You can reduce paperwork, save trees, and receive your statements faster and in a more secure fashion by signing up for free eStatements. Once you elect eStatements, you will receive email notifications when your statements and other notifications are available online.

Follow the easy steps below to start receiving electronic communications:

Existing Users: Log into Liberty at axosadvisorservices.com/liberty and proceed to Step 1 below.

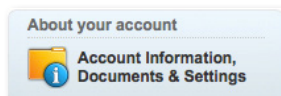
First-Time Users: Go to Liberty axosadvisorservices.com/Liberty

Investors will receive a letter with a temporary username that will be used with your nine-digit Social Security or tax identification number as your initial password (numerical characters only, no dashes) for the first logon. You will be prompted to change your username and password the first time you log on.

An acceptable password requires at least eight characters but no more than 32 characters, and should include special characters, numbers, and uppercase and lowercase letters to achieve a strength rating of medium or higher.

If your account is part of a statement family, select the head of household account identified by the asterisk (*).

1. From the main page in Liberty, select the About your account tab:



2. Click Document Delivery Options, select edit and choose Email for the delivery method.
3. Verify the email address in the row titled Email. If correct, skip to #6.

4. To add OR change the email address, select Edit button (the pencil icon on the left of the screen).
5. In the Email row, input the desired email address into the Enter field and save.
6. To change the delivery type for Statements, select Edit if it has not been selected.
7. In the Delivery Methods row, select the button for either Email (eStatements) or Standard Mail. Read and agree to the Document Delivery Terms of Agreement.
8. Select the Save button to activate the changes.
9. The information under the Document Delivery Options row should now reflect the changes.

FAQs

Q: Can my advisor opt-in to receive eStatements for me?

A: No. You, the investor, must opt-in to receive eStatements.

Q: Can I opt-in to eStatements later?

A: Yes. Sign up by the end of any quarter and you will receive free eStatements.

Q: Can I print eStatements?

A: Yes. eStatements are available in PDF form and are easy to print from your computer desktop or mobile device.

Q: Can I access past statements?

A: Yes. You can access up to six quarters of statements online.

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

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