

# STATEMENT FAMILY REQUEST

## Institutional Advisor Services



Account Number \_\_\_\_\_

### Section 1: General Instructions

Use these instructions to complete the Statement Family Request form.

**Purpose of form:** Use this form to create a Statement Family or to add accounts to or remove accounts from a Statement Family.

**Print or type all entries.** Print clearly in all CAPITAL LETTERS to complete this application. To type entries, a fillable PDF of this form can be found online at [www.axosadvisorservices.com](http://www.axosadvisorservices.com).

**IMPORTANT:** You must **complete all required fields and provide all required signatures** to expedite processing and to avoid requests for additional information.

### Section 2: Request Type

- Select One:
- Create a new Statement Family
  - Delete an existing Statement Family
  - Modify an existing Statement Family, select at least one below:
    - Add account(s) to an existing Statement Family
    - Remove account(s) from an existing Statement Family
    - Change Primary Account number to: \_\_\_\_\_ (current primary must sign this form)

### Section 3: Account Information

**IMPORTANT:** If you have accounts with multiple advisors at Axos Advisor Services, only the accounts managed by a single investment advisor may be placed in a Statement Family.

Primary Account Number \_\_\_\_\_ Desired Statement Family Name \_\_\_\_\_ Investment Advisor \_\_\_\_\_

**Primary Account Owner:**

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Last 4 of SSN or Tax Id \_\_\_\_\_

**Secondary/Additional Account Owner:**

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Last 4 of SSN or Tax Id \_\_\_\_\_

### Section 4: Additional Statement Family Accounts

1. Select One:  Add  Remove

\_\_\_\_\_ Axos Advisor Services Account Number \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

2. Select One:  Add  Remove

\_\_\_\_\_ Axos Advisor Services Account Number \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

3. Select One:  Add  Remove

\_\_\_\_\_ Axos Advisor Services Account Number \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

4. Select One:  Add  Remove

\_\_\_\_\_ Axos Advisor Services Account Number \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Additional page attached

