# STATEMENT FAMILY REQUEST

# Institutional Advisor Services



<b>Account Number</b>	

## **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.

**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						
<b>IMPORTANT:</b> 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 Statem	ment 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						

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### **Section 5: Account Holder Authorizations and Signatures**

### **Primary Account Owner Authorization**

As account owner, I/we hereby designate the account named in Section 3 as the Primary Account for the Statement Family. I/We request Axos Advisor Services to modify the Statement Family as indicated in Section 4. I/We attest that I/we will hold Axos Advisor Services harmless from any loss, claim, expense, or other liability for this action.

#### **Added Account Owner Authorization**

I hereby certify that the account(s) referenced in Section 4 is(are) managed by the Investment Advisor named in Section 3, and I authorize Axos Advisor Services to modify the Statement Family for the Primary Account designated in Section 3. I understand that I will no longer receive account statements as a result of this action. I further understand that the account owner of the Primary Account for the Statement Family will elect the method of statement delivery and can designate a new Primary Account without further authorization from the other members of the Statement Family.

I further attest I will hold Axos Advisor Services harmless from any loss, claim, expense or other liability for this action. If at some later time I wish to discontinue having my statement sent to the Primary Account, I must send new written instructions to Axos Advisor Services to make this change.

Primary Account Owner's Signature	Print Name	Date
Secondary/Additional Account Owner's Signature (if applicable)	Print Name	Date
Account Owner's Signature	Print Name	Date
Account Owner's Signature	Print Name	Date

-End of Form-