



Online Access to your Axos Advisor Services Account(s)

First Time User Steps/Password has been reset: visit SEM's website (www.semwealth.com) and click on the Axos logo at the top of the home page.

1. First time investors will receive a letter from Axos Advisor Services that includes a temporary username. Investors can use this temporary ID and their 9-digit SSN or Tax ID# (with no dashes) as the temporary password to login to Liberty for the first time. If your password has been reset, use the temporary password you have been provided. If you need a new temporary password, please contact your advisor or SEM @ 804-557-2253.
2. You will then be prompted to change your userID as well as password (please note that there may be a **RED** bar at the top that states **"Your password has expired and must be changed"**, this throws off many. Look below that and type in the current temporary password followed by a new password in the following 2 fields and click NEXT STEP). An acceptable password will use at least 5 characters and no more than 14 characters and should include special characters, numbers and letters to achieve a strength rating of Medium or higher.
3. After you set your username & password the next steps will ask you to setup your security options. First by choosing a security question and providing your answer. This answer is case sensitive. Then you'll choose a security picture. After this has been completed, you'll have gained access to your account (or accounts if you are logging into your primary Statement Family account).

To update your Delivery Method: Click on "About your Account" tab

1. Click on Document Delivery Options & make your edits.
2. Click the EDIT button to update your options. Here is where you can edit your email address as well as set your delivery options.

Document Delivery Options

Email

Delivery Methods

Proxies and Interim Mailings	<input type="radio"/> Email	<input type="radio"/> Standard Mail
Statements	<input type="radio"/> Email	<input type="radio"/> Standard Mail

Document Delivery Terms of Agreement [SHOW](#)

[Edit](#)

Email

Enter

Example: myemail@example.com

Delivery Methods

Proxies and Interim Mailings	<input type="radio"/> Email	<input type="radio"/> Standard Mail
Statements	<input type="radio"/> Email	<input type="radio"/> Standard Mail

Selecting "Standard Mail" for "Statements" may result in additional charges to your account, please contact your Investment Advisor for more information.

- a. Electronic Proxies & Interim Mailings, **you will also need to create a 4-digit pin.** This is a pin of the clients choosing.
 - i. Account holders may elect to receive electronic versions of the Proxies and Interim Mailings as they are available for delivery rather than receiving the printed versions that are currently sent in the mail. Axos Advisor Services will send a notice to the email address on record for the account when new Proxies and Interim Mailings are available for access via a web link. In order to elect to receive electronic documents provide your consent by checking that you have read these terms and click on the save button at the bottom of the EDIT page.

b. Electronic Statements & Documents:

- i. Account holders may elect to receive electronic versions of the account statements, statement inserts, and account related documents as they are available for delivery rather than receiving the printed versions that are currently sent in the mail. Axos Advisor Services will send a notice to the email address on record for the account when new statements and documents are available for access via a web link. In order to elect to receive electronic documents provide your consent by checking that you have read these terms and click on the save button at the bottom of the EDIT page.

3. After choosing email for statements, you will need to check the box to agree that **“I and all other owners, custodians, and fiduciaries on this account – agree to the terms and conditions of the Document Delivery Terms of Agreement.”** So that **SAVE** is available to update their delivery method, click on **SAVE**.

Availability of Electronic Statements and Documents - Account holders may elect to receive electronic versions of the account statements, statement inserts, and account related documents as they are available for delivery rather than receiving the printed versions that are currently sent in the mail. Axos Advisor Services will send a notice to the email address on record for the account when new statements and documents are available for access via a web link. In order to elect to receive electronic documents provide your consent by checking that you have read these terms and click on the save button below.

Availability of Electronic Proxies and Interim Mailings - Account holders may elect to receive electronic versions of the Proxies and Interim Mailings as they are available for delivery rather than receiving the printed versions that are currently sent in the mail. We will send a notice to the email address on record for the account when new Proxies and Interim Mailings are available for access via a web link. In order to elect to receive electronic documents provide your consent by checking that you have read these terms and click on the save button below.

Revoking Consent - Your consent, when given, is effective until further notice by Axos Advisor Services or it is revoked by an account holder. You may revoke your consent and begin to have paper documents mailed to your address of record by selecting standard mail, agreeing to the terms and saving your changes. If you do withdraw your consent, you will begin receiving paper copies of your statements at the cost, if any, as previously disclosed/stated by your advisor.

Information on Systems Requirements - To enroll in the electronic delivery program and receive electronic documents you must have a valid email address on record at Axos Advisor Services and Internet access via a browser that is JavaScript-enabled, such as Internet Explorer or Firefox, and the ability to read Portable Document Format (PDF) documents.

Invalid Email Address - If your delivery preference is set back to paper delivery because of an invalid email address, you will need to re-enroll for e-delivery.

Electronic Delivery Exceptions - While account statements and the associated statement inserts are available for electronic delivery not all account documents are available in electronic form at this time and you may continue to receive some documents in the mail.

I - and all other owners, custodians, and fiduciaries on this account - agree to the terms and conditions of the Document Delivery Terms of Agreement.

Cancel Save

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Revoking Consent - Your consent, when given, is effective until further notice by Axos Advisor Services or it is revoked by an account holder. You may revoke your consent and begin to have paper documents mailed to your address of record by selecting standard mail, agreeing to the terms and saving your changes. If you do withdraw your consent, you will begin receiving paper copies of your statements at the cost, if any, as previously disclosed/stated by your advisor.

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Cancel Save

4. The information under the “Document Delivery Options” row should now reflect the changes

Add/Edit Two Factor (downloading into other software *may* not take the 2-Factor)

Under the “About Your Account” tab, there is a Security Settings option that includes setup for Two-Factor Authentication. You will have a drop-down option to turn it on or off and then hit “SAVE.”

