

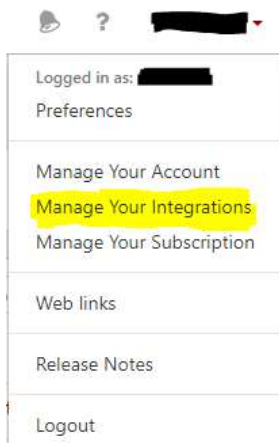


## Opening AXOS accounts with Redtail

Redtail users can use the data already in Redtail to create accounts through Redtail. To turn on this integration, please contact your SEM Service Team. Once the integration has been set-up, follow these steps:

### Set-up the Integration in Redtail

- 1.) Click on your name in the top right corner & choose Manage Your Integrations.



- 2.) Scroll down to AXOS Advisor Services. If it is not already, Switch the slider to "On". Note you may need to search the "Disabled" tab, switch the slider "on" and go back to the "Enabled" tab at the top.



- 3.) Click on the gear icon and choose "Settings"



- 4.) Enter the Username & Password for your Liberty login. Note: This is the Liberty login, not your Redtail one. Some password managers try to pull your Redtail credentials. You may have to go to the dashboard of your password manager to pull the username & password. \*\*If your password

manager asks, DO NOT save the updated password here, it may replace your Redtail password with your Liberty password\*\*

You should be all set-up. The only time you'll have to come back here is if your password changes in Liberty (which it does periodically). Follow steps 1, 3, & 4 to update your password.

### Open an Account Using Redtail

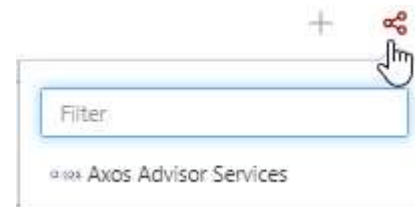
- 1.) Find the contact in Redtail you'd like to open an account for. Note you'll need to have the **tax ID, address, phone number, and email address** in Redtail before proceeding to Step 2.

- 2.) Click on the Integration logo at the top of the page and choose "Axos Advisor Services" from the list.

- 3.) Choose "Open an Account"



- 4.) Select the "Account Type"



Account Type  
Please select

Models Fees **Representatives** Beneficiaries

add representative

- 5.) DO NOT ENTER anything for Models or Fees – SEM takes care of this when the signed paperwork is received.

- 6.) Click on "Representative"

- 7.) If the Representative did not automatically pull up, click on "add representative" & then select the Representative from the list.

8.) Make sure the correct boxes are checked and the % of Fee is 100%.

REP ON STATEMENT  RECEIVES STATEMENT  % OF FEE

9.) If you have Beneficiary information in Redtail you can add them in the Beneficiaries tab. Otherwise you can add them to the forms later. Though don't be let down if it doesn't reflect in Liberty. Axos requires a client signed form to list on an account.

[create account](#)

10.) Click "Create Account"

11.) Redtail will then be contacting Liberty, so be patient and do not click off any boxes while the account is opened. Retail may not reflect when the account is created, check liberty for the last name of client. If Redtail shows completed, you may see the options for further actions, continue with eSignature by clicking "Continue" or choose "Cancel".

Account [redacted] has been created at Axos Advisor Services.

Open an Account

Would you like to continue with e-signature processing?

[continue](#) [cancel](#)

[back](#) [cancel](#)

If your B/D allows eSignature, please contact us for additional information and to be set-up for this functionality.

## Find the forms in Liberty

1.) Log into Liberty and click the "Client Management" tab. The easiest way to find the newly created accounts is to make sure the filter is set for "Accounts created in the last 7 days" (this is the default setting) and then sorting by the "Created Date". (Note: If you cannot see the account, it is possible you didn't add the Representative. If so, please contact SEM and we can add the representative to the account so you can view it.

Analytics **Client Management** Prospecting Tools Documents My Profile

Accounts [Users](#)

ACCOUNT SEARCH ACCOUNT LISTS ACCOUNT QUERIES

Search  Search Criteria  Search

Filter

Viewing 1 of 1 results

Account	Name	Status	Type	Create Date

2.) In the pulldown menu on the right, select "Account Details"

Registration Steps

Account Details

Model Allocations

Representatives

Interested Parties

Beneficiaries

Fees

**Forms**

3.) Verify the information pulled from Redtail in the Account Details tab. Correct or add any information necessary and then go to the Forms tab.

4.) Click on the link to the forms you would like to pull up. You can then print or save the forms. (We recommend printing them to a pdf and creating one large packet.)

5.) This will give you all the forms needed to open the account, except the SEM New Account Form. You can find that at SEMWealth.com/Paperwork-Checklist (under MORE)