

ACH MoneyLink is a service provided by Axos Clearing, LLC, connecting your bank accounts and investment accounts for seamless cash management. All bank links, except for IRA accounts, will be established with On Demand instructions to allow for money movement in or out of your brokerage account. **Please complete all information, sign where indicated and return to your Registered Investment Advisor.**

STEP 1: ACCOUNT INFORMATION

Account Title (Name of account)	Account Number
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STEP 2: INSTRUCTION TYPE- Multiple bank links are permissible per brokerage account. Complete a separate form for each bank.

- Add New Instructions
 Replace Existing Instructions
 ADD NEW WILL ESTABLISH A NEW BANK LINK OR CREATE ADDITIONAL LINKS IF PRIOR INSTRUCTIONS EXIST. REPLACE WILL UPDATE OR CHANGE EXISTING INSTRUCTIONS

STEP 3: TYPE OF REQUEST IF OTHER THAN ON DEMAND

- Dividends/Interest (income received will be transferred) (Select frequency)
 Distributions – Periodic transfers to bank account (Frequency, amount & date required)
 Contributions – Periodic transfers to brokerage account (Frequency, amount & date required)

A DISTRIBUTION REQUEST FORM IS REQUIRED FOR RETIREMENT ACCOUNTS

Frequency (select one)

- Daily (D) – Dividends and Interest only Bi-monthly (I) – occurs every other month
 Weekly (W) – occurs every week Quarterly (Q) – occurs every 3 months
 Semi-Monthly (E) – occurs twice a month Semi-Annually (S) – occurs twice a year
 Monthly (M) – occurs every month Annually (A) – occurs once a year

-DAILY IS FOR NON-IRA ACCOUNTS ONLY
-PLEASE ALLOW 5 BUSINESS DAYS FOR ESTABLISHMENT OF NEW OR UPDATED MONEYLINK INSTRUCTIONS

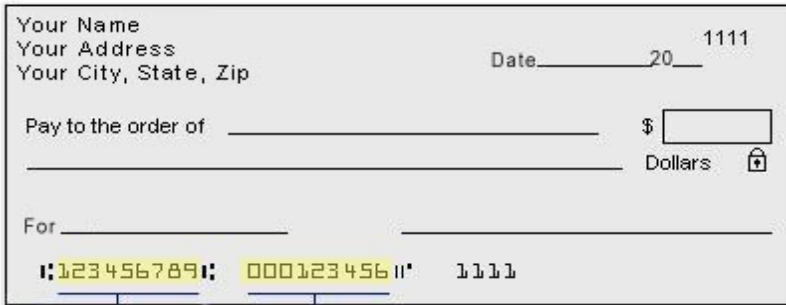
Amount \$ Amount Start Date:

STEP 4: BANK/CREDIT UNION ACCOUNT INFORMATION

Account Type: Checking Savings

ABA Number/Bank Routing Number	DDA Number / Bank Account Number
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Voided Check: Attach an original voided check here



WE CANNOT ACCEPT STARTER CHECKS OR COUNTER CHECKS.

IF A VOIDED CHECK IS NOT AVAILABLE, PLEASE ATTACH A LETTER FROM THE BANK, ON BANK LETTERHEAD CONFIRMING THE BANK ACCOUNT OWNERSHIP, ACCOUNT NUMBER AND ROUTING INFORMATION.

Routing Number Account Number

STEP 5: SIGNATURES

SIGNATURE(S)		
<i>By affixing my signature below, I represent to Axos Clearing LLC and my Registered Investment Advisor that the information contained above is truthful and accurate and represents my instruction.</i>		
Account Holder Signature x	Print Name	Date
Account Holder Signature x	Print Name	Date
REGISTERED INVESTMENT ADVISOR (RIA) SIGNATURE		
<i>By signing below, I attest that I spoke with my client identified above and verbally confirmed that the instructions contained in this letter of authorization are true and correct and have originated with my client</i>		
Registered Investment Advisor Signature x	Print Name	Date
INTERNAL SIGNATURE APPROVAL		
Internal Signature x	Print Name	Date