

Sample Screens and Modals

The screenshot shows the Axos Bank mobile app interface. At the top, the Axos Bank logo is on the left, and navigation icons for Messages, Contact, Alerts, Support, and Log Out are on the right. Below the logo, there are tabs for Dashboard, Accounts (selected), Pay Bills, Move Money, and Make a Deposit. Under the Accounts tab, there are sub-tabs for All Accounts and External Accounts. The main content area displays the account name 'Checking **9505' with a dropdown arrow, and the available and total balances, both at \$205.13. Below this are buttons for Transactions, Account Details (highlighted), Statements/Tax Forms, and Debit Cards. A notification banner states: 'One or more of your beneficiaries are pending spousal consent' with 'DISMISS' and 'RESEND EMAIL' options. The 'Account Details' section is divided into 'Account' and 'Ownership' sections. The 'Account' section lists: Account Nickname (Checking **9505), Account Type (Checking), Account Number (100000339505), Routing Number (122287251), Date Opened (12/07/2015), and Interest Rate (0.00% APY). The 'Ownership' section lists: Primary Account Owner (HUGH M BRYAN), Primary Beneficiaries (Child Bryan 100% with a 'PENDING CONSENT' status), and Contingent Beneficiaries. To the right, a 'I want to...' section offers actions: Order checks, Stop payment, Update my address, and Add a Beneficiary.

Tooltip Content _____

Text for “Primary Beneficiaries”:

Beneficiaries who are first to receive the assets in your account. If no beneficiaries are named, the assets will go to your estate.


Text for “Contingent Beneficiaries”:

Beneficiaries who receive the assets in your account only when there are no living primary beneficiaries.

Text for “Pending Consent”:

Your change of beneficiaries is pending until your spouse provides their consent.

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[Dashboard](#) [Accounts](#) [Pay Bills](#) [Move Money](#) [Make a Deposit](#) [Insights](#)

Update Primary Beneficiaries

IRA Trading *1234

[← Back to Account Details](#)

Add or modify your Primary Beneficiaries

You may not designate yourself or another account owner as a beneficiary. If no beneficiaries are named, the assets in your account will go to your estate.

Primary Beneficiary # 1 Remove


First Name	Last Name	
<input type="text"/>	<input type="text"/>	
Date of Birth	Relationship	Share
<input type="text"/>	<input type="text"/>	100 %

[+ Add another beneficiary](#) Total Share Out of 100% 100 %

[Save](#)

Beneficiary Acknowledgement


Accounts held in the names of two or more owners will become payable to the designated beneficiaries only upon the death of all account owners. If there is more than one beneficiary, the funds in the account will be paid to the beneficiaries based on their designated percentage share. The interest of any beneficiary who predeceases the account owner(s) terminates completely, and the percentage share of any remaining beneficiaries will be increased on a pro rata basis. In the event that all named beneficiaries predecease the account owner(s), the estate of the account owner will be the beneficiary. You may change your designated beneficiaries at any time.



You have not named any beneficiaries

Adding beneficiaries to your account ensures your assets go where you want.

[Remind Me Later](#) [Add Beneficiary](#)




Remove Only Beneficiary?

If no beneficiaries are named, the assets in your account will go to your estate.

[Remove and Return to Account Details](#)

[Cancel](#)

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Spousal Consent

Consent to Relinquish Interest in IRA Account

I am the spouse of **FirstName LastName**, and I understand that because I was not designated as the sole primary beneficiary on their IRA account, my consent is required to process the request.


I understand that I must consult my own legal and tax professionals for any clarification of the consequences related to providing my consent.

I hereby consent to fully or partially relinquish my interest in this IRA account.

I agree and give my consent

I disagree and do NOT give my consent

[Submit >](#)


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You cannot modify beneficiaries while pending spousal consent

You can resend a consent request to your spouse or cancel the consent which reverts your beneficiaries

[Resend Consent >](#)

[Cancel Consent and Revert >](#)



Unable to Remove Beneficiary

Remove all contingent beneficiaries before removing your primary beneficiary

[Ok](#)

[Cancel](#)

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Investment Profile

Product: Self-Directed Trading

Select your combined level of overall investment experience.

Beginner Intermediate Expert

[Verify the specific levels of experience](#)

Select your investment objective.

- Income**
Investing that emphasizes high dividend yields.
- Growth**
Long-term investing that offers portfolio growth and may use dividends to purchase more shares.
- Balanced**
Investing that balances capital preservation with growth and may pay dividends.
- Maximum Growth**
Long-term investing that offers portfolio growth, may use dividends to purchase more shares, and allows advanced trading techniques.
- Growth & Income**
Investing that generates income while providing substantial growth potential.
- Speculation**
Investing that uses advanced trading techniques for the opportunity to realize high-returns.

Time Horizon [?](#)
Select Time Horizon

Risk Tolerance [?](#)
Select Risk Tolerance

Dividend Instructions [?](#)
Select Dividend Instructions

Cash Sweep Program

The uninvested funds in your account are automatically transferred into a higher interest-earning investment option at the close of each business day.

Yes, I want to participate in the Cash Sweep Program. [View Details](#)

Save & Continue >

[< Back](#)