

LEADERSlink tutorials:

UPDATE AUTHORIZED USER

Please reach out to **Tate Krumwiede** at **303-797-9080 x125** to request support staff access.

Log in to LEADERSlink. If you have any questions, please email support@leadersgroup.net.
Navigate to the **Home Office Requests** tab:

LeadersLink

Bill Advisor

LEADERSlink

Search...

Search

Home Dashboards Payout Accounts **Home Office Requests** Compliance Approvals Books & Records Docs

LeadersLink Resources

Advisor
RightBridge
Training Videos
Starlight Portfolios
FINRA Manual

Create New...

Shortcut

Calendar

Recent Items

John Test
BRD-3325
Test Business
Household
Test Household
Test

Messages and Alerts

Dashboard

Refresh

As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor.

Compensation Overview

Beginning Balance:	\$0
Change Since Last Payout:	\$0
Gross Commission Payable:	\$0
Less Amount On Hold:	\$0
Net Commission Payable:	\$0

Compensation Activity

Current Week (Net):	\$0
Previous Week (Net):	\$0
Month-to-Date (Net):	\$0
Quarter-to-Date (Net):	\$0
Year-to-Date (Net):	\$0

Hold/Suspense Report

Client	Hold Reason	Sum of Commission Payable
Total		0.00

My Tasks

New

All Open

You have no open tasks scheduled for this period.

Calendar

New Event

Today 10/13/2017


You have no events scheduled for the next 7 days.

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

1 7 31

Click **Create New Home Office Request**:

 Home Office Requests

Home


View: All Go! [Clone](#) | [Create New View](#)

Recent Home Office Requests

Create New Home Office Request

Home Office Request
CMP-2617
CMP-2571
CMP-0070
CMP-2570
CMP-0060
CMP-0067
CMP-0057
CMP-0068
CMP-0069

Select the type **Add/Change Authorized User** of home office request you would like to submit:

 New Home Office Request

Select Home Office Request Record Type

Select a record type for the new home office request.

Select Home Office Request Record Type

Record Type of new record Add/Change Authorized User

Continue Cancel

Available Home Office Request Record Types

Record Type Name	Description
Add/Change Authorized User	Please use this form to grant access or remove access to your commissions information, logins and passwords associated with The Leaders Group.
Advisor Request to Add / Drop State Registrations	
Update Bank EFT Information	Use this to change the bank account where you receive your commission payments.
Update Contact Information	Use this to change your Business Address, Home Address, or Phone Numbers.

Click **Continue**.

The following will appear on your screen, complete the necessary fields. Please keep in mind any fields marked with a red bar are required and must be completed in order to proceed to the next step.

Home Office Request Edit

New Home Office Request

Home Office Request Edit

Save

Save & New

Cancel

Information

Advisor

Record Type

Add/Change Authorized User

Submission Status

Open

Access Granted/Removed For (one person per form)

Action Requested

--None--

Replace existing authorized user?

--None--

First Name

Last Name

Email Address

Can They Contact Us About Compensation?

--None--

Create LeadersLink Login For Them?

--None--

Access Authorization

Certification

I verify that I am the advisor entered on this form. I am granting or removing access to my compensation, clients, and all other information available to me on LeadersLink as detailed above to/from the individual specified. I am aware that if I am adding a second authorized user to my account that I may be charged \$400 on an annual basis for the additional access.

Advisor Signature

Notes

Description

Save

Save & New

Cancel

You can either have a log in created for this person or not. You can also grant them access to your compensation information or you can give them access only to your client records, without compensation details.

Once the fields are completed, click **Save**.

Click **Submit for Approval**.